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1	STATE OF CONNECTICUT DEPARTMENT OF INFORMATION TECHNOLOGY
2	Modernization of Client Service Delivery (MCSD) CT #09ITZ0042
3	PROJECT IMPLEMENTATION SUMMARY AND PERFORMANCE OBLIGATIONS
5	<p>Connecticut's legacy Eligibility Management System (EMS) is among the nation's most comprehensive welfare eligibility systems. This mainframe system provides fully integrated data processing support for the determination of client eligibility, benefit calculation and issuance, financial accounting, and management reporting. EMS supports many of the agency's major programs such as Temporary Family Assistance (TFA), Medical Assistance (Medicaid and State Medical Assistance), Supplemental Nutrition Assistance (SNAP), State Supplement to the Aged, Blind, and Disabled, the State Administered General Assistance (SAGA), Refugee Cash and Medical Assistance and the Managed Care Program. The system has been functional since 1989.</p>
6	<p>The solution will interface with and complement the EMS system functionality. The Contractor shall provide the State of Connecticut with a fully integrated set of services that will enable the State to effectively implement the planned Modernization of Client Service Delivery requirements. In accordance with service-oriented architecture design principles, these services will be interoperable. This allows each service to function independently or in conjunction with other services. Employing this conceptual approach will provide maximum flexibility for future needs. These services collectively are known as the "MCSD Solution Platform."</p> <p>The platform will be enabled by architecture which will serve as the "framework for the future" and provide core services which will be used to deploy and integrate the proposed technologies. Web services will allow customers to access DSS programs and interact with DSS via the Internet. Telephony services will provide the ability for clients to access information and request forms via telephone and will facilitate interactions between customers and customer service agents via phone. Document management and workflow services will help streamline processes for DSS workers and reduce paper. Shared services will facilitate the flow of information between the services and will help achieve a fully integrated solution. Each of the services that comprise the MCSD Solution Platform will meet operational requirements which will enable effective use and maintenance of the system.</p>
7	<p>The Solution will initially support the administration of eligibility process for the following DSS programs:</p> <p>Temporary Family Assistance (TFA) Medical Assistance (Medicaid and State Medical Assistance) Supplemental Nutrition Assistance (SNAP) State Supplement to the Aged, Blind, and Disabled State Administered General Assistance (SAGA) Cash and Medical Assistance HUSKY B and Charter Oak Health Plans.</p>
8	<p>Web services will use the Internet to provide access to DSS services 24 hours per day, seven days per week (24x7). Clients will have the ability to conduct pre-screening for benefits and services to assess preliminary eligibility. This will give clients direct access to a tool they can use to evaluate potential eligibility and reduce the workload of DSS caseworkers by reducing the burden of responding to eligibility requirement related inquiries. The online application service will provide the ability for clients to apply for services via a single, integrated online application. Additionally, clients will have the ability to access information about their benefits, report changes, and conduct online redeterminations via secure client accounts.</p> <p>The Web Services will be developed using Deloitte's Wisconsin Access solution as a base. The solution contains core functionality which already meets many of the State's requirements. Web Services will be integrated with the Dynamic Business Rules Shared Service which will be powered by the Corticon Business Rules Management System to facilitate the design, management, and execution of business rules.</p>
9	<p>Telephony services will facilitate phone-based access by DSS clients. Clients will be able to obtain the status of their application and/or case, get answers to FAQs, and request forms via an Interactive Voice Response (IVR) system and will have the capability to connect with DSS customer service representatives. Additionally, the telephony services will provide call center administration functionality including call routing.</p> <p>Telephony services requirements utilize a hosted IVR solution. This solution will greatly reduce up-front and maintenance costs associated with building and maintaining a telephony infrastructure. The call center service will be provided by Siemens and it provides the ability for DSS to scale call center capacity up or down to adjust to changing business needs. Additionally, it will facilitate seamless customer service support by staff located in multiple physical locations.</p>
10	<p>Document management and workflow services will benefit DSS workers by streamlining document management processes and reducing paper. The solution includes a centralized scanning and indexing operation.</p> <p>A document library will be used to support electronic case folders and electronically manage case related documents. Additionally, workflow software will be implemented to support routing and tracking of documents, task management, and will be fully integrated with web services.</p> <p>The solution will meet the document management and workflow requirements by using IBM FileNet statewide enterprise system. FileNet Capture is the imaging solution that will convert paper documents into digital content. FileNet Content Engine and FileNet Process Engine manages the content repository, provides content management capabilities, provides workflow functionality and integrates with the other services.</p>
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12	Performance Functionality
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14	Web Services
15	4.1 Web Hardware and Software Requirements
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17	<p>Deloitte must provide a list of hardware and software which they shall need to implement their products and services. This shall include, but not be limited to:</p> <ul style="list-style-type: none"> • Web Servers; • Storage; and • Database Servers. <p>Deloitte shall work with DSS to identify and assist in the purchasing of the product directly through existing State of Connecticut contracts, GSA, or if needed the ITB process.</p>
18	4.2 General Requirements
20	<p>At a minimum Deloitte shall provide the following types of online help:</p> <ul style="list-style-type: none"> a. Field Level Help that provides information for each field on a given page using mouse-over functionality. b. Screen Level Help provides information regarding each page including a summary of the data included on the page. Users can quickly access more information about any page within the application by clicking a link. c. Process Level Help provides information on how the system works and general navigation components.
22	Deloitte shall provide Web Services client-facing screens, including help capabilities in both English and Spanish with translations provided by DSS.
24	The solution shall provide the capability to forward the document packets (which includes the main document and accompanying forms) to a DSS print queue/file. This print queue/file shall be forwarded to DSS on a predetermined schedule for printing and distribution.
26	<p>Deloitte shall provide user training and training materials for the Web Services, including screen designs, help screens and reports. Deloitte will take a collaborative approach to training designated DSS personnel on our solution. Deloitte shall provide and maintain training materials for the Web applications that meet the needs of DSS stakeholders. The training manual and quick reference guides are among the training materials that Deloitte will develop. The training materials will be written in a simple, straightforward style that is suitable for non-technical users. Deloitte will deliver the training through Train-the-Trainer sessions and will position the DSS trainers for success.</p> <p>The following table provides a list of the training materials we shall deliver through a "Train-the-Trainer" approach for the Web application.</p> <ul style="list-style-type: none"> • MCSD overview presentation • User manual • Trainer guide • Student guide • Quick reference guides
28	The Deloitte solution for Web Services shall have the capability to present a voter registration form as part of the application/redetermination/change-reporting processes. This functionality shall also have the capability to support printing or mailing the form to the client for an original signature along with the ability to track and report on the voter registration requests.
30	The Web Services shall have the capability to display and print a bar code on the receipt/verification checklist, which identifies the client and used to associate returned documents with a specific client/case/electronic folder.
32	Deloitte shall provide the functionality to support multiple levels of access by internal staff and external community partners using Role-Based Access Control (RBAC). We propose implementing this functionality using DoIT's Novell eDirectory,
34	Deloitte shall incorporate a dynamic rules engine that is flexible enough to allow DSS staff to change business rules for workflow processing in one place after system implementation.
35	4.3 General Inquiries
37	Deloitte shall provide Web site screens with accessibility compliance and cross browser compatibility involves requiring that the Web Services comply with the standards as laid out in Section 504 and 508, Subpart B, 1194.21 & 1194.22, and satisfy Priority checkpoints of the WCAG 2.0. These services are able to be rendered in standards compliant web browsers that understand and support HTML, XHTML, Cascading Style Sheets, ECMAScript and W3C Document Object Model.
39	Deloitte shall provide an approach towards providing content management functionality within the Web Services Solution Platform through the usage and implementation of reference tables and reference data. These reference tables are exposed and accessible to DSS through the reference table editor within the administration module of the Web Services.
41	Deloitte shall provide client communications through a multitude of different avenues including Frequently Asked Questions (FAQs) and eligibility information. The client communications shall be tested against the Flesch Reading Ease Scale to confirm that they are presented at a sixth-grade reading level or lower.
43	Deloitte shall provide Web Services that shall be enabled by an efficient, full-featured, cross-browser, cross-platform, browser-based help system that allows clients to search frequently asked questions by keywords and/or phrases. The help system is accessed individually from the end user's browser.

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45	Deloitte shall leverage existing navigation features to meet the MCSD system navigation requirements including intuitive navigation which allows the user to view the next logical step in the process, allows them to select another topic, return to sub-menus, or return to the main menu.
46	4.4 Pre-Screening and Preliminary Eligibility
48	Deloitte shall work collaboratively with DSS SMEs to develop the business rules for the pre-screening service. The business rules for each program in the pre-screening service shall be determined during the design sessions. The Deloitte team shall leverage its rule templates from other states as a basis for discussion with DSS SMEs.
50	The Deloitte solution for the pre-screening service shall provide a series of screens, which shall allow the client to determine potential eligibility. These screens shall have the capability to be viewed, printed locally, or printed at DSS and mailed to clients. The base solution utilizes dynamic scheduling of screens and data elements to accelerate the screening process. Deloitte shall make sure that the pre-screening service shall work with the State standards for compliant browsers to facilitate viewing the screens and using to the pre-screening service. The ability for users print pre-screening screens is a requirement the pre-screening service shall meet.
52	The Deloitte solution for pre-screening service shall provide a potential eligibility summary screen that can be viewed, printed locally, or printed at DSS and mailed to clients. The summary screen shall provide a listing of potentially eligible/ineligible statements based on the programs selected by the client. The service shall contain printing functionality.
54	The Deloitte solution for pre-screening service shall provide clients with options for next steps based on pre-screening results. Deloitte shall work collaboratively with DSS to determine appropriate next steps during design. The pre-screening service shall allow a user to view next steps. Deloitte shall work with DSS to determine the appropriate next steps for each program included in pre-screening. This screen shall also provide users with the opportunity to proceed to the online application to apply for benefits.
56	When a client is pre-screened as potentially ineligible, Deloitte's Web Services solution shall inform the client of other options for requesting services. Deloitte shall work collaboratively with DSS to determine other options during design.
57	4.5 Client Accounts
59	Deloitte's proposed solution allows users to create a secure account that provides them access to various functions including returning to access and complete unfinished applications.
61	Deloitte's proposed solution shall provide existing EMS clients 24x7 access to view their current case information, as well as the ability to submit any necessary changes to their caseworker using the same web account. This includes a DSS provided interface with EMS and ConneXion.
63	Deloitte's proposed solution has the capability to link MCSD temporary client accounts to existing client accounts in EMS by allowing the user to enter State prescribed, personally identifiable information that verifies client case status. To link these accounts with existing cases in EMS, our solution shall provide an interface for clients to access their active status by entering a combination of personal information such as social security number, client ID, and case number, in accordance with State security standards. The solution shall also allow workers to manually link temporary account ID with Permanent EMS ID's.
65	Deloitte's solution for account creation and authorization of external client processes, shall fully comply with DSS' security requirements. Client personally identifiable information shall be securely captured and/or maintained in full compliance with HIPAA and Social Security requirements. Deloitte's team shall work closely with DoIT to confirm that the established State standards and policies are strictly adhered to.
67	Deloitte's solution shall have the capability to pre-fill the web screens as well as each of the system generated forms when required. Information stored in the EMS or MCSD databases can be used to populate initial application, redetermination, and change reporting screens and forms with pre-filled data to confirmed system users.
69	Deloitte's proposed solution has the capability to be customized to collect various client preferences including details around how clients would like to receive web generated communications. After logging into the Landing Page the user shall be able to access and update their preferred method of communication at any point in time.
71	Deloitte's solution shall confirm that the client data collected is readily available to workers with various roles and access levels. Our solution shall provide an inbox of user submissions to workers (customer service representatives, etc.) whose identity has been confirmed and whose role meets required security access standards to view this data. Deloitte shall design the solution to be customizable at a role and function level. As an integrated team of Deloitte and State personnel, Deloitte shall collaborate during design sessions to meet and potentially exceed the client accounts requirements for the Customer Service Representative access.
73	Deloitte's solution shall provide clients with the ability to provide credentials to gain access to the specified information. Deloitte's solution provides roles-based access to various data and functionality throughout the application. Clients who have a valid account shall have the ability to view current case details, statuses and any other information defined during the Design Phase. The solution is completely customizable to allow for clients to view various case and transaction status details through the client web application once they have created and confirmed a user account.
75	Deloitte's solution shall have the capability to interface in real-time with EMS and/or ConneXion and the Document Management and Workflow Service to provide an up-to-date tracking mechanism for users to manage certain tasks that need to be completed.
77	Deloitte's solution shall provide the infrastructure for collecting the data required to confirm through an interface that a client is known to an external system, such as EMS or ConneXion. Once confirmed, the link between our MCSD solution and the external system is stored, thus providing the user access to various data and/or functionality.
78	4.6 Submission of Online Applications

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80	Deloitte's solution shall contain a single, integrated, shared front-end application for data collection services. The service is flexible enough to dynamically collect only the data required based on programs being applied for, previous responses, or special business rules. Data is logically mapped to each web screen, and screens that collect similar data are grouped into modules. The service manages the volume of combinations and permutations that result as the number of programs and services increase.
82	Deloitte shall work with DSS to develop data validation rules for each user enterable field.
83	Deloitte's online application service shall promote consistency by incorporating built-in validations. Deloitte's solution contains a flexible and scalable data validation service that contains an efficient repository of commonly used edits and messages.
85	Deloitte's online application service shall display field-based online instructions to aid constituents as they proceed through the application process.
87	The Deloitte solution shall allow clients to save their application and come back and authenticate and edit their saved application prior to submission. Deloitte integrates the save and exit feature on each page of the online application, providing the ability for a client to stop and save their application at any point in time prior to submission. This feature is designed to be easily recognizable and consistently appears in the same area on each screen.
89	Deloitte shall work with DSS to design and develop a Worker Dashboard which shall provide the ability for DSS workers to access tasks and manage client submissions (i.e., applications, redeterminations, change reports, verifications, etc.) received through the Web Services. In addition, the Worker Dashboard will expose reporting capabilities which allows DSS workers to request or view reports of aggregated data collected through the Web, Telephony and Document Management, and Workflow Services. The Worker Dashboard provides a personalized view of the tasks, and other critical information. Applications submitted through the online application service shall be routed to the Worker Dashboard for approval by a DSS worker. The assignment of this task will be handled by the workflow capabilities of the IBM FileNet Process Engine. Deloitte shall work with DSS during the design phase of the project to determine the functionality and design of the approval and verification screen as well as the application review screens.
91	The online application service shall allow clients to locally print a completed application. This functionality is provided through the creation of a PDF which can be saved, printed locally, or printed at DSS and mailed to clients.
93	Deloitte's online application service provides the ability for clients to electronically sign their applications prior to submission. Deloitte shall include structured database tables specifically designed to securely maintain electronic signature data separate from other application data. This information is protected through use of audit trails and database permissions that keep it from being edited or deleted.
95	The driver component of the Deloitte framework is a screen queuing mechanism that automates navigation through the application. The driver guides the client through the appropriate data collection screens thus allowing the application to present the client with only relevant modules, screens, and data elements in response to the programs selected, the questions answered, and the household's circumstances.
97	Deloitte has proposed the Corticon Business Rules Management System as the rules engine software to be used by the Web Services of the MCSO solution. This includes Corticon Business Rules Modeling Studio which provides a user friendly application for rule modeling. With the Corticon Business Rules Modeling Studio, no programming skills are necessary to learn how to model rules, analyze them for logical errors, and test the execution of even the most complex decision-making logic. Deloitte shall provide training on the Corticon Business Rules Modeling Studio to authorized DSS staff. The training shall include hands-on product experience with Corticon that emphasize proper and efficient use of the Corticon Business Rules Modeling Studio, confirming that authorized DSS staff has the skills necessary to model, analyze, and test rules and decisions.
99	Deloitte's online application service shall provides a submission confirmation page to clients at the end the online application process which serves as a receipt of submission. This page identifies the type of document that was submitted and the location the document is being routed to. In addition, a dynamic list of verifications shall be displayed to the client based off of the information they provided throughout the application. These documents can be printed locally by the client or printed at DSS and mailed to the client.
101	Deloitte's solution allows applications submitted through the online application service to be routed to the Worker Dashboard for verification and approval by a DSS worker. The DSS worker shall have the ability to view the application for approval and edit the application if necessary. This functionality shall be facilitated through an approval and verification screen. The DSS worker shall have the ability to electronically submit the application to EMS and/or ConneXion. The transaction of this data shall be handled through an industry standard Web-service interface. Deloitte shall work with DSS during the design phase to determine what data, and the format of the data that shall be passed through this transaction.
103	Deloitte's online application service shall allow clients to add or change programs without restarting the application process from the beginning. Clients can navigate back to the start application summary screen at any point prior to submission and add additional programs to the application or remove currently selected programs.
104	4.7 Change Reporting
106	Deloitte's change reporting solution shall provide clients with a means to submit changes via the web such as but not limited to: address changes, adding/removing individuals, and change of employer/income. The solution shall capture case information updates for household circumstances. This application allows clients to report changes on various types of case information and can even customize the information available to update for each type of benefit.

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108	Deloitte's change reporting solution shall provide clients with the ability to provide credentials to gain access to their application data and update their current household circumstances within the system. The solution shall interface with the State of Connecticut's current eligibility and registration systems to retrieve up-to-date information.
110	Deloitte's Change Reporting solution shall provide a unified and consistent look-and-feel to Connecticut's online community. Deloitte shall work with DSS subject matter experts to create screen mock-ups that follow the standards published by the Department of Information Technology (DoIT) and that shall provide a consistent look and feel as the screens developed across the MCSD integration solution. Deloitte shall work with DSS to assess and accept the user interface requirements and use case models relevant to the online application solution. Deloitte shall work with DSS during requirements design sessions to develop the help functionality as well as the field level validations which are on each page of the online application.
112	Deloitte's change reporting solution has the functionality to start a change form and then save that form to be accessed and completed at a later time. Deloitte shall work with DSS subject matter experts to create the DSS process by which a client would be able to save their changes and at what point a partial change can be saved.
114	Deloitte's change reporting solution has the capability to allow the client to provide an electronic signature as part of the submission process. Deloitte shall work with DSS subject matter experts to create the detailed screen design and text. This page shall capture the information necessary for submitting an electronically signed application.
116	Deloitte's change reporting solution shall capture, report, and inform clients of the date and time that a change was submitted. DSS policy shall dictate timeframes for processing and completion of submitted changes.
118	Deloitte's change reporting service shall provide clients with clear direction and information when completing an online change report. The receipt generated shall have the ability to be printed out, requested by mail or by email by the client. The receipt shall contain the date/time stamp, the type of document, client identifying information, and a checklist of next steps which are dynamically built based off the client's changes. The receipt shall be designed specifically according to guidelines outlined in DSS policy in regards to what information requires verifications, what types of verifications are accepted, and the time frame allowed for submission of those items.
120	Deloitte shall work with DSS to design and develop a worker dashboard that shall provide the ability for DSS workers to access tasks and manage client submissions received through the three intake services (Web Services, Document Management, and IVR) of the MCSD Integrated Solution Platform. The worker dashboard shall expose reporting capabilities which allows DSS workers to request or view reports of aggregated data collected through the three intake services. Change reports submitted through the Online Change Reporting Service shall be routed to the worker dashboard for approval by a DSS worker.
121	4.8 Online Redeterminations
123	Deloitte's redetermination solution shall provide clients with a method for initiating redeterminations online on a 24x7x365 basis. After successfully logging into client case information, the solution shall alert clients to the need to submit a renewal. Accessing EMS and/or ConneXion in real time the redetermination module shall display existing data to the client for updating and changing for submission.
125	Deloitte's redetermination solution shall allow for viewing/printing/e-mail/online entry of program-specific redetermination forms. The MCSD Solution Platform shall provide flexibility to the clients in allowing them to renew programs individually or together by combining questions and data from each program into one cohesive application. At the end of the redetermination the application shall provide clients with clear direction and information at time of submission. The Redetermination module itself shall provide the ability for clients to complete a redetermination online and at the end shall provide users with a variety of options for keeping a record of the completed online redetermination by viewing, printing locally, printed at DSS and mailed to clients, emailing, or providing access for the clients to view at a later time.
127	Deloitte's proposed redetermination solution has the capability to start a redetermination and then save that form to be accessed and completed at a later time. Deloitte shall work with DSS subject matter experts to create the process by which a client would be able to save their changes and at what point a partial change can be saved.
129	Deloitte's redetermination solution has the functionality to start a redetermination and then save that form to be accessed and completed at a later time. Deloitte shall work with DSS subject matter experts to determine the timeframes by which a determination can be started and when it must be completed in order for the client's benefits to continue without a break in coverage. This message shall be presented to the client not only when saving a partially completed redetermination but also when the client logs in to check their benefits status.
131	Deloitte shall work with DSS to design and develop a worker dashboard which shall provide the ability for DSS workers to access tasks and manage client submissions received through the Web Services. In addition, the worker dashboard shall expose reporting capabilities which allows DSS workers to request or view reports of aggregated data collected through the Web, Telephony, and Document Management and Workflow Services. Redeterminations submitted through the Online Redetermination Service will be routed to the worker dashboard for approval by a DSS worker. The assignment of this task shall be handled by the workflow capabilities of the IBM FileNet Process Engine. Once generated, the task shall be populated to the appropriate worker's dashboard. The DSS worker shall have the ability to view the redetermination for approval and will also have the ability to edit the redetermination if necessary. The DSS worker shall have the ability to electronically submit the redetermination to EMS and/or ConneXion. Deloitte shall work with DSS during the Design Phase to determine what data, and the format of the data that will be passed through this transaction to EMS and ConneXion.

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133	Deloitte's redetermination solution has the capability to allow a client to electronically sign the redetermination form. Deloitte shall work with DSS subject matter experts to create the screen design and text. This page shall capture the information necessary for submitting an electronically signed application. The applicant may choose to view, print locally, or print at DSS and mailed to clients the e-signature page which contains important policy information. Deloitte shall work with DSS during requirements design sessions to develop the functionality as well as the legal text which is on the electronic signature page. State and federal regulations shall be taken into account to maintain compliance.
135	Deloitte's redetermination solution shall capture and inform clients of the date and time by which a redetermination was submitted. DSS policy shall dictate timeframes for processing and completion of redeterminations.
137	Deloitte's redetermination solution shall have functionality to control screen progress and display logic based on the defined business rules. During design sessions Deloitte shall discuss with DSS the questions necessary across programs that must be part of the redetermination.
139	Deloitte's use of business rules across programs shall make the redetermination process streamlined for the client so that they only are required to answer the necessary questions based on previous data entered. Deloitte shall incorporate in the solution a decision support system that is capable of evaluating predefined rules on a specified set of data. This decision support system shall drive queue logic which evaluates data entered to schedule pages within the application. This component shall automate these decisions and shall allow DSS to customize and quickly adapt their business rules as the needs of the business change.
141	Deloitte's redetermination solution shall provide clients with clear direction and information when completing an online redetermination. The receipt generated shall have the ability to be printed out, requested by mail or by email by the client. The receipt shall contain the date/time stamp, the type of document, client identifying information, and a checklist of next steps which are dynamically built based off the client's changes. The receipt shall be designed specifically according to guidelines outlined in DSS policy in regards to what information requires verifications, what types of verifications are accepted and the time frame allowed for submission of those items. The receipt shall have the ability to be printed locally, emailed, or requested to be printed at DSS and mailed to the client. It shall include at a minimum the date/time stamp, the type of document submitted, the client identifying information, and a dynamically generated verification checklist.
142	4.9 Custom Generated Paper Forms
144	Deloitte's solution uses client input entered during the application, redetermination, and change reporting processes to dynamically generate an itemized verification checklist. Once an online transaction has been submitted a verification checklist, which identifies the needed verifications and the acceptable sources of verification, is dynamically generated and displayed to the client. The checklist maps the data entered throughout the web process with the documents required by the State to confirm the necessary application data for the programs for which the client has applied.
146	Deloitte's Custom Generated Forms Service shall have the capability to auto-generate and pre-fill forms with information provided by the client during the application, redetermination, and change reporting processes. An interface shall exist between the Web Services and the Custom Generated Forms Service. Deloitte shall work with DSS during the Design Phase to determine the type of forms that shall be generated including, but not limited to, employer/verification and bank account verification forms as well as the client information that shall populate these forms.
148	Deloitte's Custom Generated Forms Service shall provide the ability for forms to be viewed through the client's web browser and printed locally, or emailed to the client during the online session. Each of the forms generated through the Custom Generated Forms Service shall be passed back to the requesting Web Service through the Forms Service and displayed directly in the client's web browser. The client can then view, print the form locally using the browser's print capabilities, or printed at DSS and mailed to clients. The Web Services shall also provide the option for the client to provide their email address so that forms can be delivered via email. Deloitte shall work with DSS during the Design Phase to determine the design of this email functionality.
150	Deloitte shall work with DSS during the Design Phase of the project to design forms, applications, and documents. These forms shall provide client instructions based on program rules and DSS policy. In addition, the forms shall be designed so that clients can easily and efficiently complete the form. Deloitte shall work with DSS to determine which forms, applications, or documents shall be made available through the Web Services of the MCSO Solution. Deloitte shall work with DSS to evaluate the current state of the forms and provide support in redesigning or simplifying the forms based off of our past experience in developing public facing forms available via the web.
152	Each form dispatched to the client through the Custom Generated Forms Service via email shall be in PDF format. When an email request for a form is received from the client through the Web Services, the Custom Generated Forms Service shall route the requested form to the client's email address. Upon receiving the form through their email the client shall have the ability to display the form through any PDF viewing software, print the form locally, or save the form to their computer or any other storage device. Deloitte shall work with DSS during the Design Phase to determine what data is populated into the forms and any associated security protocols that may be required to protect the privacy of the client.
154	Deloitte's solution shall provide a receipt to clients upon the submission of a form or document. The receipt shall identify the type of document that was submitted, client identifying information, and the submission date and time. Clients can view the receipt, locally print the receipt, print at DSS and mailed to clients or request to have the receipt emailed to their email account. Furthermore, a dynamic list of verifications shall be displayed to the client based off of the information they provided. This checklist identifies the needed verifications and the acceptable sources of verification.

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156	<p>Deloitte's solution contains a flexible and scalable data validation service that contains an efficient and complete repository of commonly used edits and messages. The validations range in depth from commonly used data validations to more specialized program specific validations. This repository shall be utilized as a resource while Deloitte works with DSS to identify edits for each user enterable field that requires validation. Deloitte pair each of these data validations with a corresponding user friendly message that provides instructions to the end user on how to correct errors. The messages use plain and simple English and explains in detail what the user needs to do in order to resolve the issue. The data validation service provides the ability to categorize messages into three different categories: Errors, Warnings, and Notices. Each of the messages is visually clear and easily identifiable to the user.</p>
158	<p>Deloitte shall work with DSS to design and develop a worker dashboard which will provide the ability for DSS workers to access tasks and manage client submissions received through the three intake services (Web Services, Document Management, and Call Center) of the MCS D Integrated Solution Platform. The worker dashboard will expose reporting capabilities which allows DSS workers to request or view reports of aggregated data collected through the three intake services. Electronic Forms that are generated and submitted through the Online Application, Change Reporting, or Redetermination Services shall be routed to the worker dashboard for approval by a DSS worker. The assignment of this task shall be handled by the workflow capabilities of the IBM FileNet Process Engine. The DSS worker shall have the ability to view the submission and the associated electronic forms for approval and shall also have the ability to edit these items if necessary. If the DSS worker chooses to edit the submission, they shall be driven through a series of review screens which allow them to make the appropriate updates and save a new version of the submission and electronic forms. The worker edited version of the submission will be stored in the same electronic case folder as the original. Deloitte shall work with DSS during the Design Phase of the project to determine the functionality and design of the approval and verification screen as well as the review screens. The DSS worker shall have the ability to electronically submit the information to EMS and/or ConneXion. The transaction of this data shall be handled through an industry standard web-service interface between the worker dashboard and EMS and ConneXion.</p>
160	4.10 Tracking and Reports
162	<p>Deloitte's MCS D reporting solution has the capability to provide detailed statistical reporting for DSS staff. Deloitte's reporting solution shall allow stakeholders to gain critical insight into the large amount of data that is collected by the MCS D solution on a daily basis by just a few clicks of the mouse. The Information Builders' WebFOCUS application supports template based reports and also provides an interface to create and customize the style and templates for the reports.</p> <p>Deloitte's solution shall provide detailed statistical reports for DSS management including:</p> <ul style="list-style-type: none"> • Number of applications • Redeterminations • Changes (by type) • Inquiries <p>In addition Deloitte has the capability to develop additional types that would be helpful to DSS. The actual parameters and measures of the detailed statistical reports will be defined during the requirements gathering phase of the SDLC. The details of the reports, including the look and feel, shall be further shaped and tailored to meet the needs of DSS during the design and testing phases of the SLDC. DSS will be offered a wide range of presentation options to choose from such as tables, line graphs, and pie charts.</p>
164	<p>Deloitte's solution shall provide program-specific statistical reporting. The report specifications shall be defined during the requirements and design phases of the SDLC. The parameters, measures, and presentation outputs shall be customizable. DSS shall be able to control who has access to program data and to what level of manipulation report users may have. DSS can grant the ability to request reports on demand and export results to Excel for further manipulation to specific groups or individuals.</p>
166	<p>Deloitte's reporting solution has the capability to sort by caseload, worker, office, region, or any additional criteria determined during report design. Users can select the data subset they are interested to view in a report. Users can select what specific columns they want to sort results by in an ascending or descending order, create filters at run-time, define new calculations, and display data as a bar, line, or pie chart. Users are able to interact with the reports both before and after the report has been executed.</p>
168	<p>Deloitte's solution has the functionality to allow detailed ad hoc reporting capabilities for DSS users. Through Deloitte's proposed ad hoc reporting solution, State users shall be able to have access to the DSS data in a flexible way and support impromptu data requests in a quick and easy manner. Business users can create their own analyses and reports in a Microsoft Office-like environment that guides them through the duration of the reporting process. Users create reports via wizards that guide users through the creation of parameter pages, filters, calculations, etc. Users can insert items in a report through a seamless drag and drop interface.</p> <p>Deloitte's solution for ad hoc reporting has a metadata layer where a logical view of the data sources is defined and is shared with the Information Builders tools. With this cohesive front, there is a single, common definition of enterprise data that satisfies user requirements in a consistent manner. Besides standard reports, Deloitte shall build ad hoc reporting functionality.</p>
170	<p>Deloitte's proposed training solution shall empower DSS to build and modify ad hoc reports using the functionality of WebFOCUS InfoAssist combined with clear, descriptive training materials. To compliment the intuitive user-interface of the tool, DSS shall be provided with broad documentation for creating ad hoc reports. The Deloitte team shall implement participant guides, user manuals, and quick reference guides. Deloitte shall produce these training materials as stand-alone resources, including step-by-step instructions as well as samples and exercises to confirm the information can be retained over a variety of delivery methods.</p>
172	<p>Deloitte's solution using Information Builders has the capability to integrate data across the platforms, including web, IVR, and document management. Information Builders is able to connect to a variety of data sources.</p>

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174	Deloitte's solution shall provide reports that show the status of saved/submitted applications. These report specifications shall be defined during the requirements and design phases of the SDLC. The parameters, measures, and presentation outputs shall be customizable.
175	4.11 Online Automated Workflow
177	DSS' standard applications shall be redesigned to support automatic form-recognition. Upon receipt these forms shall be automatically recognized, indexed, and transferred to the appropriate DSS work queue or caseworker for further processing. To promote automation of the unstructured documents, Deloitte proposes the use of a bar-coded coversheet. For the indexing information not available on the coversheet, users shall be allowed to key in or select from drop downs and search lists the appropriate metadata for the document. Based upon this information, the IBM FileNet Process Engine shall execute the appropriate workflow. During the requirements phase, we shall work with DSS staff to define an efficient set of workflows to be automated through the document management and workflow service. Deloitte shall also identify the specific documents that should be assigned to a particular workflow.
179	Deloitte's solution shall operate using a rules engine and shall have the capability for modification by DSS. The flexibility to make these changes shall be available to DSS approved workers to minimize the delay in addressing the new business requirements. This functionality shall allow DSS to define, and refine, the processes that occur within offices, while at the same time allowing the flexibility required to handle ad hoc workflow changes or accommodate processes that require extensive human intervention. IBM FileNet's Process Engine and Process Builder shall enable the rapid development, deployment, and maintenance of workflows while enabling proper audit and security of the workflows.
181	Deloitte shall work with DSS to design and develop a Worker Dashboard that shall provide the ability for DSS workers to access tasks and manage client submissions received through the Web Services. In addition, the Worker Dashboard shall expose reporting capabilities which allows DSS workers to request or view reports of aggregated data collected through the Web, Telephony, and Document Management and Workflow Services. The Worker Dashboard provides a personalized view of the tasks, and other critical information needed by DSS staff. Applications submitted through the Online Application Service shall be routed to the Worker Dashboard for approval by a DSS worker. The submitted application shall trigger the generation of a task that will be assigned to the appropriate DSS worker notifying them that an application has been submitted and requires action. The assignment of this task will be handled by the workflow capabilities of the IBM FileNet Process Engine. The task shall be populated to the appropriate worker's Dashboard. The DSS worker shall have the ability to view the application for approval and will also have the ability to edit the application if necessary. The DSS worker will have the ability to electronically submit the application to EMS and/or ConneXion. The transaction of this data will be handled through an industry standard web-service interface between the Worker Dashboard and EMS and ConneXion.
183	The proposed system must track the timeframes for returning verification documents based on program rules and DSS policy to be determined during the design phase and notify the appropriate DSS worker or work group when these timeframes have lapsed. Deloitte's proposed solution shall track the timeframes for returning verification documents based on program rules and DSS policy. Deloitte shall work with the State to establish timelines and escalation procedures for verification documents. Our solution supports automatic routing of tasks through built-in escalation mechanisms within the workflow models.
184	Telephony
185	5.1 Hardware and Software Requirements
187	The vendor shall provide a list of hardware and software which they shall need to implement their products and services. This shall include, but not be limited to: <ul style="list-style-type: none"> • Switches; • T1s or other digital configurations of voice-telephony carrier facilities; • Servers; • Telephony Cards; • Automated outbound calling; • Telephones; and • Headsets. Deloitte shall work with DSS to identify and assist in the purchasing of the product directly through existing State of Connecticut contracts, GSA or if needed the ITB process.
189	Deloitte understands that the programs required to access EMS (Inquiry or Update) shall be developed and implemented by DSS staff and the programs required to access ConneXion (Inquiry or Update) shall be developed and implemented by ConneXion contracted vendor staff. Deloitte shall develop and use the account inquiry shared service to provide a standard mechanism for legacy system interactions. The MCSD Solution Platform shall use messaging to send a request to the legacy systems via the account inquiry shared service. Deloitte shall work closely with DSS to determine the types of transactions and detailed data specifications for this interface.
190	5.2 Virtual Call Center
192	Deloitte shall direct, design, and manage the intergration of the IVR and Phone system including the development of the IVR interfaces. Deloitte shall needs to work with IVR and phone vendors to get the IVR/Virtual call center operational.

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193	<p>The proposed system must initially accommodate three physical call centers, approved by DSS, DoIT shall house the hardware and linked to form one virtual call center. The system must be able to route calls based on smart routing to a minimum of 3 Customer Service Rep sites. The system must initially support 120 Customer Service Reps and be easily expandable to 200.</p> <p>Deloitte's proposed IVR and Call Center Service shall be initially sized to meet DSS' needs of establishing a virtual call center supporting 3 Customer Service Rep sites accommodating up to 120 CSRs.</p> <p>The solution is a single system that can support multiple locations. Deloitte shall configure the solution to support three separate sites. The system can be expanded simply by adding additional call center agent licenses and appropriate call center representative hardware. Deloitte has also confirmed that the contact center will be fully integrated with the hosted IVR. The number of remote sites supported is based on OpenScape Voice with the OpenScape Contact Center Enterprise application configuration. OpenScape Voice supports users that can be distributed across the enterprise locations throughout the IP network.</p>
195	<p>Deloitte's proposed IVR and Call Center Service shall allow for calls to be routed to the next available Agent regardless of agent location. The OpenScape Contact Center Enterprise solution is fully integrated with the IVR allowing calls to be transferred to the appropriate call center agent based on the clients specific needs. Routing Strategies shall be developed in conjunction with DSS to allow the system to identify client needs and route the call to the appropriate agent.</p> <p>The Call Director feature proposed for DSS provides front-end menus, announcements such as position in queue or estimated wait time and collects digits that have been input by callers for identification purposes. Call Director provides up to 20 performance messages for a queue. Deloitte shall work with DSS to define appropriate routing strategies based on DSS needs.</p>
197	<p>Deloitte's proposed IVR and Call Center Service shall have the flexibility to dynamically reassign lines when needed. The proposed OpenScape Contact Center (OSCC) Manager Desktop includes a powerful scripting tool called the Design Center that is used to define routing and queue processing flows, as well as other parameters associated with the call center configuration.</p>
199	<p>Deloitte's IVR and Call Center Service shall support smart routing logic priorities. Deloitte shall work with DSS to define routing strategies for the MCSD Solution Platform. As part of Joint Application Development Session, Deloitte shall work with DSS to determine the routing priorities. Deloitte solution has skills-based routing for DSS to provide advanced intelligent routing. With the proposed skills-based routing, a virtual group concept is utilized and defined as a collection of users who share certain predefined skills.</p>
201	<p>Deloitte's IVR and Call Center Service shall handle calls consistently with equitable workload balancing. The networking feature for the OSCC Servers route and load balance calls across sites supported by the servers and provide centralized real-time monitoring and consolidated reporting. Load balancing is configured with the voice networking flow and is used to determine whether to distribute a call to a network site.</p>
203	<p>Deloitte's solution shall use the Deloitte System Development Playbook method allowing DSS to fully test the system and confirm it is working according to the specifications.</p> <p>The Systems Development Playbook method is an integrated set of processes and supporting assets for building and delivering high-quality software solutions using distributed application development teams. The Playbook was developed using knowledge and practices from Deloitte's collective experiences with a focus of building sustainable and predictable project delivery for complex software solutions.</p> <p>Playbook supports the activities that are executed during the project life cycle—from project initiation and planning to deployment of the final product and project closure. The Playbook is compliant to CMMI Level 3 process maturity expectations. The test environment which is a copy of the Production shall be used to test real-life scenarios including agents and supervisor desktops.</p> <p>A full-fledged testing environment which emulates Production will be made available for testing and validation purposes. Testing Scripts shall be created in conjunction with DSS.</p> <p>As a function of the MCSD Solution Platform, the IVR component shall follow the standard MCSD development and testing methodology to be implemented for the functions of the solution. As a part of the MCSD technical infrastructure, a testing environment will be created and maintained to provide DSS an environment to test the changes and functionalities of the IVR function. To provide a precise representation of the production environment, the testing environment for the IVR function shall be integrated with the other MCSD Solution Platform functions to provide a testing solution to evaluate the system changes.</p>
205	<p>Deloitte's solution shall provide Screen pop capability to Call Center Agents. Screen Pop shall show case relevant information as a subset of the MyAccount screen for the call to be transferred. The proposed Agent Desktop client with OSCC Enterprise provides an automatic screen pop synchronized with the arrival of each call at the agent's desktop.</p>
207	<p>Call Center workers shall have the ability to access the screens and help information as the clients. However they shall not be able to view the data that the client is entering into the screen.</p>
208	5.3 Interactive Voice Response to Generic and Case Specific Questions

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210	<p>Deloitte's solution shall have the capability to perform:</p> <ul style="list-style-type: none"> • Security validation for clients • Provide case status Information – By programs – By individual • Provide redetermination date and status by program • Provide current benefit amounts • Provide status of document/workflow • Provide EBT link to EBT Vendor • Provide capability to request medical CONNECT cards • Provide case worker information <p>A uniform strategy for client validation shall be developed with DSS input. Deloitte shall work with DSS to define a call flow which is flexible and easy to use. The solution shall also cater for certain situations where a case may be flagged for restricted/prohibited access, even if the caller is authenticated. The IVR solution shall be tightly integrated with the self-service web portal.</p>
212	<p>Deloitte's solution shall provide the capability for clients to access:</p> <ul style="list-style-type: none"> • Generic Program Information • General Office Information <p>Deloitte shall work with DSS to design a flexible call flow as well as a call menu which shall allow clients to get the general information in the shortest possible time with easy navigation.</p>
214	<p>Deloitte's solution shall comply with federal (HIPAA and Social Security) security requirements as well as DoIT and DSS security requirements. Deloitte's MCSD Solution Platform is designed to meet the requirements of the highest information security standards around HIPAA/SSA - to help confirm confidential caller information stays confidential. Deloitte's best practices scorecard/checklist contains items related to HIPAA compliance. HIPAA compliance is thus confirmed in the requirements and design phase itself before development begins. Deloitte's MCSD Solution Platform takes into account today's regulatory world and is fully compliant with the requirements and standards of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).</p>
217	<p>The vendor must provide the capability for DSS to create and install emergency and informational messages.</p> <p>Deloitte's proposed solution shall have the functionality of:</p> <ul style="list-style-type: none"> • Recording Announcements and Emergency Messages • Enabling IVR to play Emergency Messages
218	<p>Deloitte shall work with the IVR vendor to develop outbound calling capabilities to place outbound calls to customers based on client criteria. Outbound calls can be informational only or they can be fully interactive, allowing customers to get information, update their accounts, or be transferred to a live agent.</p>
219	5.4 Answers to FAQs
221	<p>Deloitte shall assist the IVR service in developing pre-recorded information based on FAQ and other program information to the callers in addition to the interaction portion of the IVR functionality that accesses the application database. As a part of the requirements and design process of the project, Deloitte shall work with DSS to determine the content of the recordings.</p>
223	<p>Deloitte's IVR Information System Component shall provide a flexible taxonomy as well as tree to allow clients to easily browse through the FAQ. Deloitte shall work with DSS to create a flexible grammar based system which supports replay, topic selection, return to sub-menu, return to main menu and the capability to transfer to a agent.</p>
225	<p>Deloitte's IVR Information System Component shall be provided to DSS with support for both English and Spanish languages. Spanish translation of the messages shall be provided by DSS and Deloitte shall be responsible for providing the necessary professional recordings for these scripts.</p>
227	<p>Deloitte's IVR Information System Component shall provide a demonstrated implementation methodology. As part of the IVR development process, Deloitte shall work with DSS to develop the content of the pre-recorded FAQs and any other pre-recorded program information that the IVR system shall make available to the callers. Deloitte shall work with DSS to create a repository of FAQs each of which shall be tagged to a list of potential questions. Each of the FAQs shall be recorded using professional voices and stored in the database. Whenever we receive a call, based on the type of information the user is requesting, the appropriate FAQ shall be retrieved and played.</p>
228	5.5 Request Applications/Redetermination/Changes/Forms
230	<p>Deloitte's IVR and Call Center services shall provide functionality for forms to be mailed or emailed at the completion of a call. The Telephony Services shall use the Custom Generated Forms Service, designed and developed to accept requests for forms by the client initiated through the IVR system. Deloitte shall work with DSS during the Design Phase to determine the type of forms, the layout of the forms, and the format of the data that is sent and returned through this interface. Deloitte's solution shall provide the client with the capability to indicate that they would like have the forms) mailed or emailed to them. Mail requests shall be forwarded to a DSS print queue/file using a batch process which shall be executed on a predetermined schedule. Email requests shall be passed by the Web Services to the Custom Generated Forms Service along with the clients' email address.</p>
232	<p>Deloitte's IVR and Call Center services implementation shall involve DSS personnel throughout the software development cycle to develop DSS policy compliant functionality and scripts for form generation, mailing and email. Deloitte shall work with DSS to develop flexible functionality including scripts for Form Generation, Mailing and e-Mailing.</p>
233	5.6 Tracking and Reporting

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235	Deloitte's solution shall provide statistical telephony reports for DSS through OpenScape Contact Center Enterprise Report Center and CSI Voice Portal. Deloitte shall work with DSS management to define the structure and delivery mechanism of detailed statistical reports. DSS can choose from a range of statistical values for blended or media-specific reports.
237	Deloitte's solution shall provide sortable reports based on a number of parameters. The actual parameters list shall be confirmed with the State during design sessions. Reports can be viewed on-demand or scheduled to run on a daily, weekly or monthly basis. Additional output options include email, printing, or content export to Excel, HTML, PDF or text file.
239	Deloitte's solution shall provide detailed ad hoc reporting capabilities. Out of the box, Voice Portal and OpenScape Contact Center Enterprise Report Center provide the tools necessary to collect and store custom data field for ad hoc reporting purpose. OpenScape Contact Center Report Center provides both predefined and ad hoc report generation. DSS users can choose from a range of statistical values for blended or media-specific reports.
241	Deloitte's solution shall provide a number of methods of recording calls are available as part of the MCSD. This includes call recording on demand (through agent desktop), automatic call recording for certain types of calls (configurable) and random call recording.
243	Deloitte's solution shall provide conferencing capability with supervisors and other 3rd parties. Call Conferencing can be done by an agent through the Agent Desktop without the use of any specialized telephony infrastructure. OpenScape Voice supports multiple party conferencing for up to 16 parties.
245	Deloitte's solution shall provide supervisors the capability to "listen in" on active calls. Supervisors have the capability to listen in on active calls locally or from a remote site.
246	5.7 Technical and User Documentation
248	Deloitte's IVR and Call Center Service shall provide a complete Administrative and user documentation package. This document shall provide an overview of the IVR, configuration details, capacity and sizing plan, voice scripts (call trees and call menus).
250	Deloitte's IVR and Call Center Service shall provide a complete documentation package excluding technical development and support. The System Configuration and Environment Document shall be a part of this package. This Document shall include Reset procedures the complete MCSD Solution Platform including graceful shutdown and support procedures. Further, the Database Documentation shall include Database details including schema diagrams and Meta data details. The Reports document shall list procedures for viewing, printing and generation of automated and ad hoc reports. Further, guides shall be developed which shall showcase functionality.
252	The vendor must provide administrative software for monitoring multiple sites for IVR in environments along with the appropriate training and training materials. Deloitte's IVR and Call Center Service shall provide administrative software for monitoring multiple IVR sites with appropriate training and training materials. This shall include a mix of Performance Reports, OpenScape Call Center Monitoring as well as System monitoring software.
253	Document Management
254	6.1 Hardware and Software Requirements
256	Deloitte shall provide a list of hardware and software which they shall need to implement their products and services. This shall include, but not be limited to: <ul style="list-style-type: none"> · Mail Opening Equipment; · High Speed Scanners; · Medium Duty Scanners (for offices); · Workstations; · Servers; · Document Storage Hardware; · Licenses; and · OCR/ICR Software. Deloitte shall work with DSS to identify and assist in the purchase of the product directly through existing State of Connecticut contracts, GSA or

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258	<p>Deloitte shall team with Scan-Optics, a leading document processing service provider based out of Manchester, Connecticut to achieve and exceed the imaging operation requirements set forth by DSS.</p> <ul style="list-style-type: none"> • Make available sufficient work space within its secure production facility located in Manchester, Connecticut for the daily processing of various DSS information formats such as paper, fax, web and email. • Scan-Optics shall scan and index documents within 48 hours of receiving them assuming that volume is no greater than 3.7 million pages per month and there are 5 index fields. • One T1 communication line. • Provide appropriate staffing to handle the daily mail pickup, mail processing, pre-scan document preparation, document scanning, indexing for both OCR and exception processing along with manual data entry as necessary. • Provide document scanning hardware for capturing paper documents delivering B/W images only, color scanning is not required. • Provide mail opening hardware. • Provide PC workstations for indexing and for the processing of other data. • Provide a Scan-Optics single point of contact, a dedicated Scan-Optics project manager. • Work under the overall direction of the Deloitte Project Manager. • Comply with methods, procedures, documentation, standards and controls for the Scanning and Indexing Operations identified by Deloitte and mutually agreed. • Provide the Deloitte Project Manager, as requested, status information/reports on work plans, schedules, deliverables, acceptance criteria and other work products related to the Scanning and Indexing Operations necessary for the completion of the project. • Produce status reports and other measurements of status and progress for the Scanning and Indexing Operations and attend project meetings as directed by Deloitte Project Manager. • Confirm that work products developed by Scan-Optics are of the appropriate level of quality and content as required by the mutually agreed acceptance criteria and jointly created by Deloitte and Scan-Optics. • Monitor productivity/Timeliness processing standards. • Return certain critical documents to clients (examples are original birth certificates and original drivers licenses).
260	<p>Deloitte understands that the programs required to access EMS (Inquiry or Update) shall be developed and implemented by DSS staff and the programs required to access ConneXion (Inquiry or Update) shall be developed and implemented by ConneXion contracted vendor staff. Deloitte shall develop and use the account inquiry shared service to provide a standard mechanism for legacy system interactions. The MCSD Solution Platform shall use messaging to send a request to the legacy systems via the account inquiry shared service. During the design phase of the project, Deloitte shall work closely with DSS to determine the types of transactions and detailed data specifications for this interface. Deloitte shall work collaboratively with DSS staff to clearly communicate requirements and ultimately facilitate the achievement of project milestones.</p>
261	6.2 Electronic Case Folders
263	<p>Deloitte's MCSD Solution Platform provides authorized users with the ability to create an electronic case folder. This electronic case folder, which shall be configured to meet DSS business needs, shall be created automatically following the successful import of documents to the document library from IBM FileNet Capture. Using meta-data elements like case number, client identifiers, and program type captured during the Indexing process, the electronic case folder shall be labeled appropriately to support efficient access and retrieval of documents. The Deloitte team shall collaborate with DSS to create a case folder structure that meets the specific business needs of the Department's caseworkers. The electronic case folder shall maintain a consistent structure and look for each case within the document management system.</p>
265	<p>Deloitte's Solution Platform provides an automated as well as a manual option for storing documents in a case folder. The document management service provide authorized users with the ability to upload and attach documents to a case folder. For documents that are scanned and indexed, the document management service shall automate the process for storing documents in an electronic case folder. If the documents are received as a part of a new application, Deloitte's document management service shall automatically create a new electronic case folder structure and link it with a temporary application number. This temporary application number will be replaced with the permanent case number once the intake process has been completed by the caseworker in EMS or ConneXion. Documents received for an existing case, with a case number that already has an electronic case folder within the document library, will be directly uploaded to that folder.</p> <p>DSS caseworkers shall be able to access these electronic case folders and the corresponding documents through tasks and the document search screen. Deloitte shall present DSS with a standard set of search options based on prior experience and tailor to your needs. Deloitte shall collaborate with DSS to develop an electronic case folder indexing schema.</p>
267	<p>Documents receive via fax shall be automatically and/or manually linked to the case folder using data captured during the indexing process when there is sufficient information to link the case provided in the faxed documents. For new applications submitted via fax, a new electronic case folder shall be created at the end of the indexing process.</p>

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269	Deloitte's MCSD document management service shall support document transfers from one case to another through an action initiated from within the MCSD document management service or from a case transfer action from within EMS or ConneXion. The system shall allow authorized caseworkers to transfer the documents associated with an individual to another case when the person transfers cases by updating the case number in the document management service. The user will be able to update the documents to assign a new case number. The change to the new case number will be recorded in the audit history associated with the case and may be viewable by reviewing the history log. Deloitte's solution shall support case transfers initiated from the eligibility source system (EMS or ConneXion) through an electronic interface that notifies the document management system when an individual transfers from one case to another in EMS or ConneXion. During requirements and design, Deloitte shall work closely with the appropriate DSS team to review the different design options to evaluate and determine the solution that is the most fit for DSS.
270	6.3 Document Imaging
272	Deloitte's solution shall provide a means for indexing that matches the business methodology of the Department. The actual indexing schema shall be determined with the State during design sessions. Deloitte's document imaging and document management services use IBM FileNet Capture and IBM FileNet Content Engine.
274	The MCSD Solution Platform shall allow for the import of documents and associated meta-data elements into the MCSD document library. During the design phase of the project, Deloitte shall work with DSS to develop an acceptable format for the images and associated meta-data elements that shall be exported by DSS from the existing document management systems for ConneXion and EMS. Deloitte's solution shall provide normalizing and cleansing of the associated metadata for each exported document before it is imported into the document library so that searches and access shall be consistent regardless of the original source.
276	Faxes are captured in a document imaging solution by one or both of the following methods: <ul style="list-style-type: none"> • Electronic fax import through use of the Captaris RightFax fax server. • Paper faxes are received by a standard fax machine and scanned into Captiva, similar to other paper documents.
278	The MCSD Solution Platform provides automatic tracking of system assigned batch information. The information is generated by our solution and stored with the documents for later audit and tracking purposes. Our solution shall track any information captured as metadata or index data. Deloitte shall work with DSS to determine the appropriate information to capture as metadata for documents in the IBM FileNet repository.
280	The document imaging service for DSS shall allow clients, community-based organizations, employers, and others to email electronic copies of documents to a pre-designated mailbox which should be accepted into the capture process and imported into the repository.
282	Deloitte's document management service includes work queues where unidentified documents can be placed to allow for human interaction to manually classify and index these documents. Additionally, the solution shall provide the ability reject (or delete) documents that were scanned or imported but no context can be determined to enable them to be indexed and released to the repository. Within the capture process for the document imaging service, it shall include work queues to hold documents that cannot be readily indexed and/or classified.
284	The document imaging service through bar coding shall provide the ability to automatically classify documents and automatically extract index information from identified documents to limit the amount of human interaction required. <p>Key features (include)</p> <p>Document Recognition</p> <p>Document Indexing</p> <p>Document Folder</p> <p>The document imaging service shall use IBM FileNet Capture capabilities for forms recognition in an attempt to identify each document. The document imaging service shall include the ability to automatically classify and index documents that can be identified with reasonable accuracy. Documents that cannot be automatically classified and indexed shall still require a staff member to manually perform these activities.</p>
286	For case related indexing, the solution shall support the ability to index documents by the EMS ID. To facilitate easy index assignment, we shall provide for a real-time validation of EMS ID, individual member ID, or other similar data that could be cross referenced to identify, assess, and assign index/metadata information automatically to avoid duplicate data entry. <p>Deloitte shall work closely with DSS to determine the required methods for search and retrieval and from there identify the necessary indexes for documents to meet those requirements. Functionality for providing multiple indices for documents to meet this requirement is available in the IBM FileNet Capture and IBM FileNet Content Engine solutions. Deloitte shall collaborate with DSS to develop a solution that supports the association of multiple index entries to a single document for new or existing documents.</p>
287	6.4 Document Library
289	The document library for MCSD Solution Platform shall reside at DSS on the IBM mainframe, the Deloitte team shall collaborate with DOIT, and other stakeholders within the DSS organization to install and configure the document library. The average social services verification document is approximately 56KB in size. Deloitte has estimated the disk required for both image and metadata storage to 2.22 Terabytes/year, based on the projected intake of 3.7 million document pages per month as specified by DSS. Our solution has been sized to handle 45 million pages per year. <p>Deloitte shall work with DSS to develop appropriate backup and business continuity methodologies in event of a system failure of any of the hardware or software components of the technical architecture.</p>

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291	The classification of documents coupled with metadata captured during the indexing process shall be used to support purging of documents from the document library. Deloitte shall evaluate DSS' document retention requirements with respect to program, state, and federal requirements by working closely with DSS program leadership and DSS' legal department. The outcome of this review shall be a data retention matrix that outlines how documents should be purged based upon document criteria such as case status, scan date, and document type. These business rules shall be captured in our Document Management service, supported by IBM FileNet's Content Engine, to enable automatic and manual execution of the required archive and disposal requirements. the MCSD Solution Platform will also provide authorized users within the DSS organization to manually purge documents based on pre-defined rules or an entirely new rules set. This shall be accomplished through an out-of-the-box feature that is available in the administration console of the IBM FileNet Content Engine and IBM FileNet Records Manager.
293	Deloitte shall work with DSS to inventory standard forms and sample case folders to build a base taxonomy for DSS.
295	The MCSD Solution Platform provides users with an interface that allows them to quickly navigate between clients, cases, and work queues. This shall support verification viewing, and ultimately more efficient processing of eligibility determination. IBM FileNet also includes a browsing interface, enabling workers to browse through case folder or client documents, while displaying the available metadata elements and indexing information that was entered by the scanning technician at the Central Scan Facility.
297	Non-imaged electronic documents that are submitted by clients via email or uploaded via the client portal in their native format can be directly imported into the imaging workflow for indexing. Our document capture service, also provides authorized users with the ability to upload non-imaged electronic documents directly to a case folder to be stored in the document library. The MCSD Solution Platform shall provide support for different types of formats for upload into the Document Library (including) <ul style="list-style-type: none"> • Rich text documents • Compound documents (Word, Visio, Excel, PowerPoint, etc.) • Web pages
298	6.5 Document Search and Retrieval
300	During the requirements planning efforts, Deloitte shall work with DSS to understand the current process and define the future process to develop search parameters that would be most beneficial and readily available to caseworkers in their day-to-day business operations. These elements shall be used to construct the indexing and search screens. Document search functionality is standard within the IBM FileNet suite of document management tools. Deloitte shall work with DSS to determine the appropriate metadata that should be displayed in the search results.
302	Access to documents and applications within the MCSD Solution Platform must be pervasive across the State infrastructure without compromising on the security of the client information. IBM FileNet provides an API that allows for the seamless extension of the entire document search and management functionality into an existing system. The worker shall be able to access any document that falls under the purview of the role granted to the worker.
304	Our MCSD Solution platform leverages IBM FileNet to provide multiple layers of access a user can have to a document, ranging from no access, meaning the user does not know about the existence of a document, to full ownership of the content. The MCSD Solution Platform leverages IBM FileNet to manage access to the object, which consists of the actual file, the metadata or attributes, as well as the relations to versions and renditions, as well as other objects within the repository. Our document management and workflow service shall enable DSS to make documents available to a wide range of users without compromising the security of client information.
306	The IBM FileNet Content Engine, the document library for the MCSD Solution Platform, can be configured "out-of-the-box" to accommodate any search structure/indexing structure required to meet the Department's needs. Parameters like case number, client identifier, program type, and others can be built into the search screen and deployed for immediate use by case workers within the DSS organization. During requirements and design Deloitte shall collaborate with DSS to develop a list of the most useful search parameters based on available document metadata. This list shall drive the configuration of the document search screen that DSS case workers shall access through the Worker Dashboard.
307	6.6 Workflow for Document Management
309	Deloitte shall work with DSS to understand the current state and its associated pain points/inefficiencies. Deloitte shall work with the State to design the future state, capitalizing on the document management and workflow service functionality benefits wherever possible. Deloitte shall present solution alternatives that address pain points and opportunities identified during a current state assessment. During these sessions, the Deloitte team shall work with DSS to identify alternatives to streamline the To-Be Business Model and develop a model that most suits the structure and organization of the DSS offices. Conducting a detailed current state assessment and creating a To-Be process shall be critical to the overall success of the project. This activity shall include the following primary tasks: <ul style="list-style-type: none"> • Conduct Strategy Session(s) • Complete Current State Business Process Assessment • Confirm Requirements and Develop future state Business Model

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311	The document workflow service shall automatically track the type of document scanned and the date/time of scan as well as allow for manual entry of a date/time received if this is different than the time scanned. Additionally, the user who scanned the document and their location and/or workstation identifier shall also be tracked with each document image. This information shall provide the necessary tracking information when determining the origins of a document for audit and/or fault situations. The MCSD Solution Platform shall automatically capture the current date/time as the scan date/time, the user ID of the user scanning/importing the documents, and the IP address of the scan workstation as indexes for each document image. Regardless of whether a document is accessed through a workflow, or through the document search screen, the electronic tag information will consistently be displayed alongside the document.
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313	The MCSD Solution shall allow for a nightly EMS alert workflow file to be received from EMS and then create a workflow tracking entry.
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315	The MCSD solution shall support automatic routing of tasks through built-in escalation mechanisms within the workflow models. Task search and assignment/ reassignment functionality is a standard feature of the IBM FileNet Process Engine, a core component of the MCSD Solution Platform.
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317	Providing supervisors' access to the tasks and work queues assigned to their subordinate workers shall be important for reporting and work balancing purposes. The MCSD Solution Platform shall allow authorized users to monitor the queues of their subordinates and reassign tasks as necessary. IBM FileNet Process Engine shall leverage the role hierarchy and security policies set up in the Novell eDirectory, and shall drive role-based access to various supervisory functions within the document management system based on those rules.
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319	The type of workflow enacted of an incoming document can be configured based on any of the metadata available during document intake. Specific workflows shall be configured to enact based on the program-type, case number, expedited flag, or any other available element. DSS' standard applications shall be redesigned to support automatic form recognition through barcode technology. Upon receipt these forms shall be automatically recognized, indexed, and transferred to the appropriate DSS work queue or caseworker for further processing. To promote automation of the unstructured documents, despite their design and content inconsistencies, Deloitte shall use a bar-coded coversheet. For the indexing information not available on the coversheet, users shall be allowed to key in or select from drop downs and search lists for the appropriate metadata for the document. Based upon this information, the IBM FileNet Process Engine will execute the appropriate workflow. During the requirements phase, Deloitte shall work with DSS staff to define a set of workflows to be automated through the document management and workflow service. Deloitte shall also identify the specific documents that should be assigned to a particular workflow. During the requirements and design phases, the Deloitte team shall work with DSS to define similar workflow activities that would benefit
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321	Out-of-the-Box functionality of the IBM FileNet Content Engine maintains a property for each document that tracks its current state. An authorized user before modifying a document shall claim ownership of the document using the available "check-out" button. Once a document has been checked out, the other authorized workers with access to the same document shall be granted only read-only access.
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323	Deloitte shall as part of the requirements gathering and validation, the DSS current process workflow shall be documented using a series of staff interviews and local office site visits. Using this as a starting point, Deloitte shall work with DSS staff ranging from field workers to senior staff to develop a future state process that alleviates the current pain points associated with paper document processing including the following: <ul style="list-style-type: none"> • Timely and detailed recording, distribution, and filing of documents received • Ability to quickly locate and access previously received documents • Issues concerning storage of closed cases and purging of outdated information • Ability to access documents in the case of client, advocate, or legal inquiry • Duplicate documentation requests to clients, particularly during recertification Based upon the business process developed with DSS, the solution will be configured to route documents to users based upon the business process and a set of business rules. IBM FileNet's Process Engine and Process Builder shall enable the rapid development, deployment, and maintenance of workflows while enabling proper audit and security of the workflows. The Process Builder includes rich conditional logic for task assignment, allowing the process to route tasks intelligently and efficiently.
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325	The MCSD Solution Platform highlights the use of the IBM FileNet Process Engine as the core rules engine to provide workflow automation and inbox functionality. The IBM FileNet Process Engine provides out-of-the box capabilities to create and manage work queues. Work queue priority is an element that can either be configured during the design of the queue or determined automatically based on parameters like number of outstanding tasks. During the design of each work queue it is possible to set a priority that shall drive the frequency of allocation of tasks to that queue.
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327	By working with DSS, Deloitte shall create a template for outgoing mail envelopes that when read by the scanning equipment shall be automatically tagged as returned mail. Much like the bar-coded coversheet the indexing information can be built into the envelope itself to automate processing.
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329	Our workflow service is flexible enough to allow for the delivery of multiple tasks to a single user or a group of users. The MCSD Solution Platform shall support this requirement through the use of workflow, which shall be capable of creating and delivering multiple tasks to the appropriate caseworkers or supervisors at defined times within the life cycle of the case. The MCSD Solution Platform shall prevent task assignment to specific work queues.
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331	A standard feature that shall be offered out-of-the-box in our solution is the capability to annotate a document without allowing editing or the document. The worker shall be able to annotate documents from within the body of the document when viewed within the IBM FileNet Image Viewer.
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333	<p>The MCSO Solution Platform supports multiple levels of authentication for approval and escalation. During the requirements and design phase, Deloitte shall collaborate with DSS to understand the different participants who shall be required to perform actions at each step in the workflow. The logic to restrict actions by the appropriate staff shall only be configured into the design of each task. This process is completely configurable and shall be completed through the IBM FileNet Process Engine tool.</p> <p>For each task a specific recipient caseworker or work queue shall be defined during requirements and design keeping DSS' business requirements in mind. The assignment of caseworkers or a work queue to a task is completely configurable through the Process Engine tool. For tasks that require approvals, the MCSO Solution Platform shall provide the ability for a worker to electronically sign the corresponding documents or the task itself.</p>
335	<p>Deloitte shall work with the DSS staff to develop a response transaction to the initial push of case and client information. This response transaction shall be transmitted once the aforementioned case and clients have been successfully registered within either EMS or ConneXion. The response transaction shall contain the real case number and client identification numbers along with the corresponding temporary application ID and the temporary client IDs.</p> <p>The document management system on receipt of this transaction, through a regularly scheduled batch job, shall automatically update the relevant fields within the electronic case folder in the document library. Both the temporary IDs and the change to permanent IDs shall be tracked in the audit history for each document and the electronic case folder.</p>
337	<p>In the MCSO Solution Platform, when a document is scanned, IBM FileNet Capture shall extend the captured metadata from the indexing step to the workflow within the IBM FileNet Process Engine. This tool, which is based on the available metadata information, shall decide on the type of task to generate, and the worker(s) or work queue(s) to which it needs to be generated. During the state process construction activity, the Deloitte team shall develop a map of the DSS Organizational Hierarchy to create profiles of different caseworkers based on their responsibilities and area of knowledge.</p>
339	<p>The Deloitte team, during the requirements and design of these workflow models, shall build into each step the ability to bypass the current or subsequent steps. During the design phase, Deloitte shall work closely with the DSS staff to analyze their existing business processes and design a series of individual workflow models that meet the different processing requirements for the intake forms and documents.</p>
341	<p>The MCSO Solution Platform shall allow caseworkers to create their own workflow entries to address the processing requirements of incoming documents and applications. The IBM FileNet Workplace tool shall allow creation of a new workflow entry, or launch a new workflow process to track the creation, transfer, and closing of the aforementioned task. In the MCSO Solution Platform, an authorized caseworker shall be permitted to forward the task to a defined set of users and work queues based on his role.</p>
343	<p>The MCSO Solution Platform shall manage documents electronically. Documents shall be grouped together and made available to the worker in a unified way much like they would be through a paper file in the current environment. Documents submitted together for a case shall be logically grouped and transmitted to the worker through a task.</p> <p>IBM FileNet Process Engine shall logically group the incoming documents into a single electronic folder that shall be made available to the worker through the task he/she receives. This task shall be a single access point for the documents that were submitted by the client through one of the many document intake channels. The task shall also provide easy access to the electronic case folder, the electronic case folder shall allow the caseworker to access other documents submitted for this case as well, which may be necessary in the worker's day-to-day business practices.</p>
344	6.7 Management Reporting
346	<p>Deloitte's solution, leveraging the built-in reporting capabilities of IBM FileNet Capture and IBM FileNet shall provide DSS caseworkers the ability to monitor who scanned or retrieved documents. IBM FileNet Capture offers summary and detailed reports for scanner, index, rescan, and other client processes associated with the document capture process. IBM FileNet provides a reporting capability to include system level, audit, workflow, and process reports out-of-the-box. These different types of reports have different scheduling and distribution options associated with each. The full list of these reports shall be identified during the requirement sessions with DSS staff to identify the business questions that these reports shall need to answer, the layout of the reports in terms of charts and graphs, and the desired output format.</p>
348	<p>IBM FileNet Process Engine shall provide DSS with the ability to produce a variety of workflow reports at the detailed and summary level.</p>
350	<p>Deloitte's proposed solution has the functionality to allow detailed ad hoc reporting capabilities for DSS users. The ad hoc reporting solution allows State users to have access to the DSS data in a flexible way and support impromptu data requests in a quick and easy manner. IBM FileNet allows for data extraction, however the level of effort to send data from IBM FileNet to an external database for supporting reporting requirements may be prohibitive. The Deloitte team shall evaluate the level of effort against using the IBM FileNet native tools as part of the project. A different tool such as Business Objects, and a separate skill set may be required based upon the State's desires.</p> <p>Deloitte's solution for ad hoc reporting has a metadata layer where a logical view of the data sources is defined and is shared with the Information Builders tools. In that way, there is a single, common definition of enterprise data that satisfies user requirements in a consistent manner.</p> <p>DSS shall be able to easily create predictive models using the R-engine, a powerful and flexible open source statistical programming language. Deloitte shall build ad hoc reporting functionality that allows users to create customized views based on specific needs that are not available in the standard reports.</p>

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352	Deloitte's training solution shall empower DSS to build and modify ad hoc reports using the functionality of WebFOCUS InfoAssist combined with clear, descriptive training materials. The Deloitte team shall implement participant guides, user manuals, and quick reference guides. Deloitte shall produce these training materials as standalone resources, including step-by-step instructions as well as samples and exercises to confirm the information can be retained over a variety of delivery methods. These materials and instructor-led training shall be distributed and scheduled as part of the training and implementation of the document management and workflow management reporting service.
354	Deloitte's solution using Information Builders has the capability to integrate data across the platforms, including web, IVR, and document management. Information Builders is able to connect to a variety of data sources. The Deloitte team shall work with WebFOCUS to identify any built-in application system adapter to be used with the IBM FileNet product. The Information Builders product can also easily integrate with the web application by connecting directly to the database where the operational data is stored. Information Builders shall also integrate with the IVR system by linking to the data generated by this application. Information Builders allows for the creation of a logical, common view of the data. This metadata presents the various data elements in business terms and acts as a buffer between users and data sources.
355	Operational Requirements
356	7.1 System Accuracy
358	Data validation when exchanging information between other external systems such as EMS will consist of performing field validation via XML schema and performing business validation by using Corticon solution to execute business rules. In addition to message routing, Deloitte shall use Enterprise Service Bus (ESB) to perform data validation and transformation between the MCS D Solution Platform and the external systems. ESB shall use XSLT technology to perform both data translation and validation. At the application level, the MCS D solution components shall use several methods of communication with other applications that it shall be integrating with such as EMS, ConneXion, EVS, and eDirectory. The implementation of the ESB shall assist with both the communication between integrated applications as well as data transformation. Deloitte shall work with the DSS to determine the appropriate method of communication to be used between the interfaces with the MCS D Solution Platform.
360	7.2 Logging and Audit Trail Functions
362	The MCS D Solution Platform includes capabilities to track customer statistics and period assessment reports which shall provide insight into customer service improvement opportunities. Customer statistics shall include application abandon rates, rates of applications which were deemed eligible for certain programs, and application averages by month. Deloitte shall conduct periodic assessments of the system usage that shall be essential for the DSS Team in identifying workflow gaps. These assessments shall be tracked through a central repository where they shall be accessible by the DSS management staff. These periodic assessments shall be a collaborative approach between the Deloitte Team and the DSS Team. They shall be conducted on a predefined schedule which shall be up to the discretion of the DSS Team. The MCS D Solution Platform shall offer capabilities to generate quarterly reports of customer statistics, internal user workloads, and system issues.
364	<p>The MCS D Solution Platform leverages logging of web activity as one of its core architectural features. This feature shall be capable of capturing the interactions between users and the web applications including data/time-stamping and identifying and tracking users usage. This information shall then be logged to a database where further reporting can be performed on the data to identify any user trends. The MCS D Solution Platform shall be able to record system interactions made by users and an audit trail shall be created for any system transactions which update data. Deloitte's approach for providing a method for logging and reporting web activity is to incorporate this capability as part of the overall application framework. By placing this capability at a framework level, Deloitte shall be able to provide a consistent set of logging functions within the same application as well as across other solutions that will be based on the same application framework.</p> <p>The MCS D Solution Platform shall be equipped with a set of system level exception logging and reporting capabilities. These shall assist with the assessment of the overall system performance and being able to quickly respond to possible production issues. The MCS D solution shall include an ability to automatically generate exception reports and business error reports and then electronically email them out based on the predefined threshold.</p>
366	<p>The ability to capture audit information for both external and internal users shall be available across the three MCS D Solution Platform services: web services, IVR and document management and workflow. The MCS D auditing approach leverages audit trail capabilities to enable passive rather than active monitoring of system interactions, to confirm that business performance is not hindered.</p> <p>Audit capabilities for the web service shall be supported by the use of an audit logging component inherent in our MCS D Solution Platform. The solution shall provide an ability to capture and store an audit log of the actions and record field updates made as separate fields.</p> <p>The Document Management and Workflow service, leveraging IBM FileNet, provides extensive auditing capabilities for the document library. Each occurrence of an audited event shall be recorded in one entry in an audit trail. Audit trail entries will be stored in the repository as persistent objects.</p>
368	<p>The MCS D solution shall provide DSS with ability to generate usage reports at the service level. Activity reports, exceptions reports, and business metrics shall be distributed in these reports to offer management insight into the interaction between the system and both internal and external users.</p> <p>The MCS D Solution Platform shall have a built-in capability of delivering key web activity data at the web page level. The approach is to use this data in providing statistics around pages which are accessed most frequently, pages which may cause a high rate of users to abandon the application, or pages which may be too complex for users based on the amount of time spent on the page.</p>

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370	The MCSD Solution Platform shall use a set of monitoring tools that shall help in evaluation of both server and network performance. Deloitte shall use HP Openview and ITCAM to monitor server based applications. Deloitte's MCSD Solution Platform shall use this set of software for its application servers. This shall be a common feature that shall provide similar set of monitoring statistics for the server-based applications in a dashboard. This software shall be capable of providing statistics around JVM heap utilization, JVM CPU usage, web container thread pool, EJB pool, database connection pool and other similar statistics that are useful in analyzing overall health of a web application.
371	7.3 System Availability
372	As part of our overall solution, Deloitte shall work with the DSS Team to meet the hardware requirements and provide an environment that shall support application clustering and shall provide high system availability. Deloitte's overall plan for meeting the external user operational 24/7 "up time" requirement starts with the initial definition and design of the solution and concludes with the monitoring of the MCSD Solution Platform in production. Deloitte shall work with the DSS Team to confirm the business hours requirements for the web and automated voice response systems during the overall requirements phase, however Deloitte understands that other than preschedule maintenance and enhancement periods for external users, these systems are expected to be operational 24/7. During the requirements phase, Deloitte shall gather information around who would be responsible for adjusting the hours as well as the process around it. Deloitte Shall identify the maintenance windows and the communication process around it. Deloitte shall design a calendar process to enable "up time" configuration through a configuration file.
373	The MCSD Solution Platform shall provide both hardware and software capabilities of distributing both Web Services and IVR solution components across a cluster of separate physical servers. These separate servers shall communicate with each other and keep the user sessions in synch to avoid unnecessary session loss in the event of a server restart.
374	Deloitte's proposed MCSD Solution Platform will provide calendar capabilities along with the server clustering in order to achieve the operational requirements of system operational ("up time") eighteen (18) hours per day, seven (7) days a week from 6:00 a.m. to 12:00 a.m., Eastern Time, for internal DSS users. Deloitte has designed the solution to provide maximum stability and availability during the stated operational hours. Deloitte is committed to working with the DSS Team to provide a flexible solution that shall allow for DSS to adjust the hours of operation, if necessary.
375	Deloitte's overall plan for meeting the internal user operational "up time" requirement of eighteen hours per day, seven days a week from 6:00 a.m. to 12:00 a.m. EST starts with the initial definition and design of the solution and concludes with the monitoring of the MCSD Solution Platform in production. During the requirements phase, Deloitte shall gather information around who would be responsible for adjusting the hours as well as the process around it. Deloitte shall also identify the maintenance windows and the communication process around it and design a calendar process to enable "up time" configuration through a configuration file. The MCSD Solution Platform shall provide both hardware and software capabilities of distributing both Web Services and IVR solution components across a cluster of separate physical servers. These separate servers shall municate with each other and keep the user sessions in synch to avoid unnecessary session loss in the event of a server restart. This approach shall provide DSS the flexibility of moving the servers into different geographical locations thus providing the necessary disaster and recovery support. The MCSD Solution Platform worker portal shall contain configurable calendaring functionality. This calendar functionality shall be configurable through an external xml file. This xml file shall provide DSS with an ability to set the hours of operations per environment and per application. DSS shall be able to adjust the hours of operation without having to redeploy the entire application.
376	7.4 System Capacity
377	Deloitte shall designed scalable web services that are capable of supporting high transaction volumes with high availability. Deploying the MCSD web service on identical horizontally scalable application servers with load balancing shall support a minimum of 2,000 concurrent web user transaction requests with the ability to scale to a peak of 5,000 transactions.
378	The hosted IVR platform shall support a minimum of 360 concurrent users with 120 Customer Service Representatives with easy extensibility to 200 Customer Service Representatives if necessary. The hosted IVR environment is capable of handling very large unplanned volume increases.
380	Stress tests shall be used to identify:
381	<ul style="list-style-type: none"> • User response times under full load • Potential performance bottlenecks in an application that are not discovered in comparative performance testing • System resources being used and potential resource limitations
382	To confirm that the stress testing scope meets DSS' capacity and sizing requirements, Deloitte shall provide DSS and the QA vendor with a draft Performance Test Plan for review and approval before the start of User Acceptance Test. The Deloitte Testing Team shall conduct a formal walkthrough to solicit comments from DSS and the QA vendor. Comments shall be recorded and a log shall be kept to capture the response to the comments. Changes to the test plan shall be documented in the Performance Test Plan Document History Log.
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384	<p>Purging and archiving mechanisms shall be designed. Deloitte shall work with DSS to gather metrics for an expected number of applicants and the growth rate. Deloitte shall then analyze the system and calculate the data size per applicant. Using that information, an estimate for the capacity can be determined. Then, hardware and software constraints shall be analyzed to see what combination fits the capacity estimates and scaling necessities.</p> <p>Deloitte's approach to address the systems' data retention and archive needs follows a four phase approach:</p> <ul style="list-style-type: none"> - Requirements capture - Data Analysis - Automation Options Analysis - Implementation <p>The use of SAN storage supports the requirements for the MCSO Solution Platform across services. Deloitte shall use a SAN for server-based storage.</p> <p>Deloitte shall work with DSS through these four phases to identify a solution that meets the requirements, is manageable, and is performing. This includes supporting the testing of mock archive and purge runs using a limited data set.</p>
386	<p>The Deloitte team shall confirm that the MCSO solution meets the IVR transaction volumes.</p> <p>Deloitte shall submit the MCSO Capacity Test Plan before any capacity testing takes place. First, Deloitte shall create a Deliverable Expectations Document (DED) to document the capacity plan contents. Applicable Templates from Deloitte's Performance Center of Excellence shall be used as accelerators to develop the plan. Key considerations for IVR capacity testing shall focus on the primary components of IVR capacity planning:</p> <ul style="list-style-type: none"> IVR Workload IVR Infrastructure Resources IVR Service Levels <p>Capacity testing shall be performed using Empirix Hammer On-Call. This service conducts testing by simulating a service flood of thousands of calls. The load shall be customized according to the requirements. As capacity tests are executed, the Deloitte team shall document the results and prepare reports identifying the status of the capacity testing efforts. The Deloitte team shall hold a meeting with the QA vendor, and others as appropriate, to review the results. Deloitte shall work with DSS to tune the environment as necessary per the capacity testing review feedback. At the conclusion of capacity testing the Deloitte team shall prepare a final Capacity Test Results Report to confirm the necessary capacity of the system infrastructure components to support the requirements for the target IVR service levels. The final report shall be submitted to the QA vendor for review and presented in a formal walkthrough. Any comments on the final report shall be recorded and addressed prior to the submission to DSS for final review and approval.</p>
388	<p>Deloitte shall confirm that the solution meets the web services transaction volumes. Deloitte shall submit the MCSO Capacity Test Plan before any capacity testing takes place. First, Deloitte shall create a DED to document the capacity plan contents. Applicable templates from Deloitte's Performance Center of Excellence will be used as accelerators to develop the plan. Key considerations for web services capacity testing will focus on the primary components of web services capacity planning:</p> <ul style="list-style-type: none"> Web Service Workload Web Service Infrastructure Web Service Levels <p>Once the Capacity Test Plan document is created, it shall be submitted to the QA vendor for review. As needed, DSS ITS and DoIT staff shall be invited to participate in the review. Deloitte shall hold a walkthrough to review the contents, log any comments, update the document, and then baseline the document prior to submitting to DSS for final approval.</p> <p>Capacity testing shall be performed using HP LoadRunner. Scripts shall be created. The load can be customized according to the requirements. The Deloitte team shall document the capacity test results and prepare reports identifying the status of the capacity testing efforts. The Deloitte team shall hold a meeting with the QA vendor, and others as appropriate, to review the results. Deloitte shall work with DSS to tune the environment as necessary per the capacity testing review feedback. At the conclusion of capacity testing the Deloitte team shall prepare a final Capacity Test Results Report to confirm the necessary capacity of the system infrastructure components to support the capacity requirements</p>

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390	<p>The Deloitte team shall confirm that the MCSD solution meets the monthly volume of documents received by DSS as well as the number of users that may be retrieving and/or viewing documents. Deloitte shall submit the MCSD Capacity Test Plan before any capacity testing takes place. First, Deloitte shall create a DED to document the plan contents. Where applicable, templates from the SD Playbook will be used as accelerators to develop the plan. Key considerations for Document Management capacity testing shall focus on the primary components of Document Management capacity planning.</p> <p>Document Management Workload Document Management Infrastructure Document Management Service Levels</p> <p>The Capacity Test Plan Document shall be submitted to the QA vendor for review. As needed, DSS ITS and DoIT staff will be invited to participate in the review. Deloitte shall hold a walkthrough to review the contents, log any comments, update the document, and then baseline the document prior to submitting to DSS for final approval.</p> <p>Capacity testing will be performed using HP LoadRunner. Scripts will be created. The load can be customized according to the requirements. The Deloitte team will document the results and prepare reports identifying the status of the testing efforts. The Deloitte team will hold a meeting with the QA Vendor, and others as appropriate, to review the results. Deloitte shall work with DSS to tune the document management environment as necessary per the capacity testing review feedback. At the conclusion of testing), the Deloitte team shall prepare a final Capacity Test Results Report to confirm the infrastructure capacity of the system required to support the performance requirements for the document management services. The final capacity report shall be submitted to the QA vendor for review and presented in a formal walkthrough. Any comments on the final report shall be recorded and addressed prior to the submission to DSS for final review and approval.</p>
391	7.5 Performance
393	<p>Deloitte shall collaborate with DSS during the requirements and design phase to define a set of imaging and scanning profiles based on business objectives, including:</p> <ul style="list-style-type: none"> • Daily image volume • Peak activity • Location/organization function • Resource constraints and skills • Network Bandwidth • Facilities logistics <p>Deloitte shall confirm that the performance objectives are met and bring lessons learned and creative alternatives that provide opportunities to streamline operations and gain efficiencies so that case workers can focus on service delivery.</p>
395	<p>Deloitte shall use its development best practices and shall regularly evaluate the performance of a maximum of one (1) second field-to-field response time web navigation during each phase of the development cycle. Performance tests and evaluations shall include the use of HP LoadRunner to confirm that field-to-field response time is within acceptable limits. This does not include Network latency and mainframe response time.</p>
397	<p>Deloitte shall use performance monitoring tools include the use of HP LoadRunner to confirm that a maximum of three (3) seconds web screen-to-screen response time is within acceptable limits. This does not include Network latency and mainframe response time.</p>
399	<p>The response time for case folder and document retrieval shall not exceed five seconds. Deloitte's understanding is the industry standard measurement of Time to First Byte (TTFB) shall be used as the defining metric. To measure responsiveness we are proposing the following procedures:</p> <ul style="list-style-type: none"> • Non-Production • Production • External Calls <p>Deloitte shall work with DSS to identify and gather existing primary source data on end users sites and available bandwidth to those sites. For sites where such data is not available, Deloitte shall create a model that extrapolates data for these sites based upon known data. This does not include Network latency and mainframe response time.</p>
400	• Production
402	<p>During requirements, Deloitte shall work with the DSS, DSS ITS and DoIT to confirm the requirements to restore the MCSD Solution Platform and its associated data in the event of a system failure in any of the infrastructure components – hardware, software, application systems, databases and other COTS products that make up the MCSD Solution Platform. During the design phase, Deloitte shall work with DSS to understand the Department's current Disaster Recovery strategy and update its current plan to incorporate the MCSD Solution Platform.</p>

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404	<p>Deloitte's disaster recovery planning shall take into account DSS' business needs and requires the modification to existing Disaster Recovery and Business Continuity plans to mitigate impacts in disaster scenarios. Deloitte shall work with DSS to modify existing plans.</p> <p>Deloitte shall conduct sessions with the appropriate business and technology stakeholders to understand the key business continuity requirements, assess risks and formulate a recovery strategy. The Business Continuity Plan shall align with and be part of the Disaster Recovery documentation. As a proactive measure, we shall make sure the system backups are tested for accuracy by recovering them every six months to confirm successful recovery of the environment in case of a disaster. In addition, we shall have a near-real time Disaster Recovery environment for IVR and Web Services to confirm that restoration takes place as quickly as possible.</p> <p>The Disaster Recovery and Business Continuity plans shall describe the strategy and procedures for recovering the solutions should a disaster substantially disrupt operations. Specifically, the Disaster Recovery Plan shall include:</p> <ul style="list-style-type: none"> Actions to be taken before, during and after a disaster Ability to restore data from web/IVR repository and document library A description of data recovery A description of a process for system component failure A description of measures to be in place in the event of an extended interruption A description of the requirements and processes to confirm the availability of critical resources and facilities to allow Business Continuity in a disaster situation <p>Database backups for the Deloitte MCSD Solution Platform shall be near real-time through disaster recovery mirroring.</p> <p>Changes to application data that occur during regular online and batch hours are transparently written to the disaster recovery database. For other processing in which files are used, the files shall be backed up via batch job into the backup storage designated by DSS. Deloitte shall work with DSS to establish an exception process to accommodate the scheduling of limited or non-recurring processing on an as-needed basis.</p>
406	<p>The Business Continuity Plan shall align with and be part of the disaster recovery documentation. As changes are made to the MCSD Solution Platform or systems that interface with MCSD, the Deloitte team shall assess whether changes are required to the Disaster Recovery and Business Continuity plans. Any anticipated changes to the Disaster Recovery and Business Continuity plans shall be reviewed with the QA vendor, DSS, DSS ITS and DoIT as appropriate through a formal walkthrough. Comments shall be captured and recorded and incorporated into the document updates. Changes to the plans shall be recorded in the Document History Log.</p>
408	<p>Deloitte shall work with DSS to prepare a Contingency Plan for the solutions following the steps in our methodology:</p> <ul style="list-style-type: none"> Perform a Business Impact Analysis (BIA). Make an Assessment of Risk. Recovery Strategy. <p>Deloitte's MCSD Solution Platform includes instrumentation frameworks that shall monitor the application against performance standards. The MCSD Solution is designed to provide an error handling support in the event of application or communication issues occurring during the normal use of the application. The underlying framework is designed to include an efficient exception handling component that follows the Java Pattern standards.</p> <p>Deloitte's MCSD solution includes a separate mechanism for publishing exceptions. This exception capture process is handled by a separate component and used throughout the application. Additionally, this component reduces the amount of custom error handling and allows for easy debugging. The component provides an efficient and easy mechanism while isolating exception management from business logic code.</p> <p>The MCSD Solution is also equipped with an error messaging component that provides MCSD with a simple mechanism for delivering and managing error messages. The component provides built-in multilingual support and is optimized through the use of caching mechanisms.</p> <p>Access to error information is provided through a runtime interface.</p>
410	<p>To help identify the scope and critical steps that need to be accommodated in the plan, Deloitte shall work with the DSS to answer critical questions that drive the scope of the backup planning effort. Deloitte shall work with the DSS to translate these answers into a backup plan. The backup plan shall cover the different types of backups for MCSD. Deloitte shall perform a test of the Disaster Recovery Plan in concert with DSS.</p>
411	7.7 User, Technical and Administrative Documentation

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413	<p>The vendor shall be responsible for developing and maintaining system documentation, training materials and other documentation throughout the life of the project.</p> <p>Deloitte's document creation and maintenance for the deliverables shall follow standard protocols established through our deliverable management process. Prior to the creation of any system documentation, the Deloitte team shall develop a Deliverable Expectations Document (DED). The DED shall describe the scope, objectives, audience, acceptance criteria, format, key dates, resource needs, and proposed table of contents for the document. The DED is intended to avoid rework downstream by getting agreement early on with DSS as to what is expected to be delivered as part of the deliverable. The Deloitte team shall leverage existing DED templates to jumpstart this process by first seeking to gather existing documentation for each of the key business areas in DSS. Deloitte shall then research documentation of current processes and policies to develop an initial understanding of the current processes and baseline operating environment, and we will meet with subject matter specialists within your organization to further understand their particular needs. Deloitte shall conduct interview sessions with key management, leveraging knowledge obtained from existing documentation, but seeking to further clarify and gain information which shall provide a deeper, more precise understanding of the current processes pertaining to each business function. Deloitte will also conduct meetings necessary to gather additional information related to key technical requirements.</p> <p>Deloitte shall create documentation that is easy-to-read, well-organized, and will adhere to and meets/exceeds stringent standards of quality. The Deloitte training and implementation team will use the MCSD system documentation, including but not limited to: Business Models, Use Case Models, Training Manuals, and Storyboards to develop documentation that is designed with the end system user in mind: Online Help, User Guides, Job Aids, and other tools to address the needs of adult learners. Deloitte shall also create, store and maintain all documents in a central repository which shall be accessible by the MCSD team.</p>
415	<p>Deloitte shall provide and maintain documentation associated with the components of the MCSD Solution Platform in an electronic format to enable collaboration and easy access to the project stakeholders. Documentation will be presented and maintained using the Deloitte Deliverable Management process. During the DED approval, documentation format requirements shall be reviewed with DSS and subject to its approval. Documentation shall be consistent with industry standards and shall be based on standard Deloitte templates that have been previously used in a number of public sector projects. Deloitte shall review these templates with DSS to confirm that the key expectations are met.</p> <p>The Deloitte team shall physically store and maintain MCSD system documentation in an eRoom, accessible to users specified by DSS staff. Documentation in the electronic library (eRoom) repository shall be versioned and managed similar to code.</p>
417	<p>Deloitte's approach to revising and maintaining system documentation encompasses processes associated with our deliverable management, configuration management, and change control processes. As part of the impact analysis effort associated with system modifications or updates, the Deloitte team shall identify documents that need to be modified. Deloitte shall leverage the Requirements Traceability Matrix to help identify documents that are impacted by the change. Following the standard process for managing configuration changes to the MCSD Solution Platform, Deloitte's team shall conduct a walkthrough of the proposed changes with appropriate DSS staff (and QA vendor staff if needed). A high-level description of the changes shall be added to the deliverable revision log that shall serve as an audit trail of changes made to the document.</p> <p>After the document has been reviewed and accepted, the Deloitte team shall place the document back under version control and store the revised version in the eRoom. The eRoom shall maintain the versions of project documentation.</p>
419	<p>Deloitte shall provide user manuals, a student guide, quick reference guides, and supporting material that shall be easy to comprehend by non-technical user groups including the ones specified in this requirement. These manuals shall contain general information about the application, including an overview of the application itself, an introduction to critical concepts and terminology, key features within the application, guidance on how to navigate within the application, and descriptions of the functions that can be performed within the application.</p>
421	<p>The MCSD Solution Platform shall include online screen level and field level help screens that are context-sensitive and searchable. The MCSD Online Help shall be the primary ready reference resource for information on the application features and functions. It shall be developed for use online and shall employ basic Internet/intranet navigational features so that any user, regardless of his or her function, can readily locate, identify, understand and use the information.</p>
423	<p>Deloitte shall provide QRGs for both the User and Technical Documentation to facilitate system usage and reference and shall update the QRGs guides to reflect the latest system updates throughout the life of the contract.</p>
425	<p>Deloitte shall provide design documentation including dataflow diagrams, user/computer interaction and process flows at the transaction level. This shall include User and Administrative Documentation - Technical Documentation has been removed from this requirement.</p>
427	<p>Deloitte shall provide and maintain a data dictionary for the Web and IVR services, including, but not limited to, naming conventions, data elements, and relationships among entities.</p>
429	<p>Deloitte shall provide detailed documentation of operating procedures for the proposed systems. Deloitte's MCSD Operations Manual shall provide DSS with a framework to deliver application support services in a structured and repeatable manner while maintaining application integrity, control, and quality.</p>

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431	Deloitte shall develop and execute a Security Plan for the applicable activities that shall be conducted. The Security Plan shall encompass the security approach, methodology, roles and responsibilities, and processes and procedures. Deloitte shall use a baseline IT security framework and tailor it to address the specific security requirements of the project. Deloitte shall define key roles and responsibilities within the team to address security of various IT components and meet project objectives.
432	
433	<p>Deloitte shall maintain a Program Installation Guide (PIG) document that describes the process of setting up, configuring, building and deploying the MCSD System to the Development, Training, User Acceptance Test (UAT), Staging and Production environments. DSS shall have the opportunity to review and accept the documents in walkthroughs. This shall also confirm that the content is in line with DSS' understanding and contain the level and quality of content deemed sufficient by DSS.</p> <p>The Program Installation Guide (PIG) document describes the following processes:</p> <ul style="list-style-type: none"> Software/Tools Configuration Application Build and Deploy Configuration Maintenance <p>The PIG document covers installation requirements for memory, disk, software requirements and version updates.</p>
434	
435	DSD Document shall capture the design philosophy and system at a high level, as well as detailed object level descriptions. This document shall outline the proposed application design to support the development of MCSD based on the assumptions and requirements documented in the Requirements Traceability Matrix (RTM) form. The detail system design document shall provide the detailed design of each functional component within the MCSD application. Deloitte shall leverage its' existing DSD templates to provide DSS with the DSD Document and shall work collaboratively with DSS to obtain buy-off on the document table of contents before it is populated with the pertinent information.
436	7.8 Training
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438	Deloitte shall provide operational system knowledge transfer, training and support to be accepted and monitored by DSS Office of Organizational and Skill Development (OSD). The Deloitte training team shall work closely with the DSS to develop a knowledge transfer/training plan which details the areas where training program knowledge is transferred to DSS Office of Organizational and Skills Development (OSD) training personnel, the method of knowledge transfer, and the target date by which the knowledge transfer must be complete. The transfer curriculum identifies the categories of knowledge to transfer, as well as the participants to whom to transfer knowledge.
439	
440	<p>Deloitte shall provide and maintain training materials in electronic format using Adobe PDF and Microsoft Office 2003. These materials shall be developed to meet the specific needs of DSS stakeholders. The following table provides a list of the training materials we shall provide.</p> <ul style="list-style-type: none"> • MCSD Overview Presentation • User Manual • Trainer Guide • Student Guide • Quick Reference Guides <p>These documents shall be written in a simple, straightforward style that is suitable for both non-technical and technical users. Deloitte shall work with DSS to create an agreed-upon deliverable management process where Deloitte can engage interactively with a DSS document review team who shall provide feedback and accept the final documents before production.</p>
441	
442	Deloitte shall develop and maintain a training database that supports the learning objectives established for MCSD. Deloitte's training team shall work with DSS to establish a maintenance strategy and schedule for this training system to be kept up-to-date. The test data within the training system shall be refreshed at regular intervals.
443	
444	Deloitte's training and training materials for DSS telephony administrators support staff shall be limited, as the recommended approach is a solution hosted by a third party. A general overview and informal training shall be conducted by Deloitte in order to familiarize the DSS telephony administrators and technical support staff with the hosted solution.
445	
446	<p>Deloitte shall provide a testing/training environment which shall be available prior to and after implementation. The execution of the training requires the creation of a specialized environment and the establishment of specially customized data sets that shall be used during training.</p> <p>A special environment called the "Training" environment will be created in a non-production server. Deloitte and DSS trainers shall collaborate to determine how frequently the "Training" environment will be updated with the most current code and configuration.</p> <p>Deloitte shall collaborate with DSS MCSD to identify a database to use as the starting point of the Training Environment. The data shall be prepared for the training environment before the execution Training-For-Trainers. This initial data set can be used to deliver Training-For-Trainers and be built upon further by DSS MCSD staff. Deloitte shall give guidance to the DSS MCSD team to create customized data sets to support the rollout of end user training.</p>
447	Deloitte's training team shall work with DSS to establish a maintenance strategy and schedule for this training system to be kept up-to-date. This

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448	<p>Deloitte shall provides a suite of resources and tools to assist DSS trainers in classroom preparation/delivery, post-training assistance to discover lessons learned and opportunities for improvement and ongoing user support. Deloitte shall also conduct capacity building and knowledge transfer with the DSS staff determined to be responsible for ongoing management of MCSD training materials.</p> <p>Deloitte shall work closely with DSS trainers and prepare them to assume the training responsibilities after the completion of the Training-for-Trainers training period. This preparation includes the ability to update training materials and provide ongoing end user training after the initial system implementation. To accomplish this goal, our instructors provide trainer trainees with insights, tips, and coaching through each step of the training delivery to develop a fully capable DSS team of trainers.</p> <p>Training materials are submitted for review prior to the first training session, and are refined and enhanced throughout the entire training effort. The training materials are also updated as necessary during the maintenance/support period to reflect any changes to system functionality or DSS policy. Training materials shall comply with the Americans with Disabilities Act.</p> <p>The training materials for the MCSD implementation include:</p> <ul style="list-style-type: none"> • MCSD Overview Presentation • User Manual • Trainer Guide • Student Guide • Quick Reference Guides • Context-Sensitive Online Help <p>Deloitte shall develop three major training courses:</p> <p>Web Services</p>
449	7.9 Testing
451	<p>Deloitte shall create detailed Test Plans for review and approval by DSS and the QA Vendor to confirm that the requirements are being met and that the key components of the system are being tested and functioning at the desired levels.</p>
453	<p>Deloitte shall perform the following levels of testing to be monitored by the QA vendor and provide documented test results to DSS for review and approval:</p> <ul style="list-style-type: none"> · Functional testing; · Capacity, load, and stress testing; · Integration testing; · Performance testing; · System testing; · Regression testing; and · Migration testing.
455	<p>Deloitte shall provide DSS and the QA Vendor access and to the UAT environment along with providing support and guidance during execution of UAT.</p> <p>As part of our UAT, Deloitte shall:</p> <ul style="list-style-type: none"> • Provide support to DSS and the QA Vendor to achieve acceptance from the user community that the new system shall function in accordance with their business requirements and expectations • Ascertain that the system shall support the business processes and business requirements • Identify any changes that must be made prior to production processing <p>Successful completion of the UAT shall indicate that the system is ready to be deployed. UAT is intended to be performed in an integrated test environment that mirrors production from a functional architecture viewpoint. It is recommended that the UAT environment is dedicated with no other test efforts.</p>
457	<p>Deloitte shall use it's Project and Integration Management Methodology for tracking project-related issues identified during the course of the MCSD project.</p>
459	<p>Deloitte shall leverage its change management approach. Deloitte shall customize this approach as needed to meet the needs of DSS and include key members from the decision making parties.</p> <p>Deloitte shall leverage its PMC tool to monitor, track, and resolve change requests. Project change requests shall be identified by individuals (including stakeholders or project team members)</p> <p>For the MCSD Solution Platform, Deloitte shall utilize a defect management and tracking tool to accomplish the following activities:</p> <ul style="list-style-type: none"> • Track bugs and code changes • Communicate with teammates • Submit and review patches • Manage quality assurance (QA)
460	7.10 Technical Support
462	<p>Deloitte shall assemble a Service Desk team that specializes in handling MCSD-related calls. The Service Desk team shall be responsible for analyzing incoming calls and triaging issues by logging a problem ticket for the issue, assigning a severity level, escalating the issue to the appropriate channels, and keeping the users updated with the current status of the issue.</p>

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464	Deloitte shall provide a minimum of one hundred eighty (180) day post implementation onsite support with options for extending this period at additional costs.
466	A designated Deloitte team member shall be available on an on-call basis as a single point of contact (typically accessible through e-mail, cell phone, or traditional pager) to provide application, interface, and database maintenance support for critical and high priority issues. Deloitte shall provide a designated primary and backup contact to DSS ITS Project Manager who shall act as a single point of contact for twenty-four hours a day, seven days a week, 365 days a year by staff with excellent communication skills and proper knowledge of the DSS system.
468	Deloitte, upon change order request, approval, and mutual agreement, shall provide technical knowledge transfer and operational support to DSS of the development and production of MCSD.
469	8 Project Management
471	Deloitte's shall develop a MCSD Project Management Plan (PMP) that defines in detail what should be done, who shall do the work, when the work shall be accomplished, how much the project shall cost, how the product shall meet stakeholder requirements, and how the project shall be managed in areas such as communications, risks, issues, scope, status reporting, and variance controls.
473	Deloitte shall create and maintain the project work plan, developed in MS Project. The plan shall reflect the detailed listing of tasks, subtasks, dependencies and resources required to perform and complete the identified activities and deliverables. This project work plan shall be discussed and reviewed with DSS and the QA vendor at the initiation of the project and refined as needed.
475	Deloitte's resource planning identifying Level of Effort (LOE), roles and responsibilities of both vendor and expected DSS resources should be based on limitations of JAD sessions running 5 hours a day, 5 days a week as well as any other tasks proposed by the vendor requiring state resources.
476	8.1 Quality Assurance Contractor
478	Deloitte understands that DSS has contracted with First Data Corporation (FDC) to provide project quality assurance and control (QA/QC) and perform independent verification and validation (IV&V). Deloitte shall work collaboratively with DSS, other State staff, FDC personnel, and other stakeholders throughout the project to identify efficiencies, follow federal and state regulations, define and inform of current trends and issues, and create and/or update documentation.
480	Deloitte is committed to completing SDM documents as required, or completing alternative documents that are deemed suitable by DSS.
482	<p>Deloitte shall generate a bi-weekly status report and submit it to the DSS Project Manager. The report shall summarize the activities that have been completed as well as activities that are planned for the upcoming period.</p> <p>The status report shall include but not limited to:</p> <ul style="list-style-type: none"> • A list of tasks and their associated deliverables completed and awaiting approval at the end of the reporting period (since the last meeting), with completion dates identified • A list of tasks started or in progress but not completed during the reporting period (since the last meeting) with target completion dates • Identification of tasks (in progress and/or completed) ahead of schedule • A list of tasks behind schedule, or scheduled to have started, but were not started, together with reasons for delays and estimated completion dates • Problems encountered in the current or prior reporting periods and proposed solutions • Problems resolved since the last meeting and the methods of resolution • A list of any questions, potential new risks, and/or issues that must be resolved • Identification and justification of any adjustments in the schedule (time), resources (staff), scope of work, and costs • Schedule for the next reporting period's activities including deliverables and dates • Risk status for new or previously identified risks to any aspect of the project • Status of hardware/software/infrastructure planning, purchasing, installation, and testing activities
483	Deloitte shall prepare monthly status reports for the Steering Committee and submit them to the DSS MCSD Project Manager. These reports can be utilized by the Steering Committee for meetings, or for their review. As with the bi-weekly status reports, Deloitte shall work with DSS to agree on a format that meets the needs of the Steering Committee.
484	9.2 Vendor Staffing Obligations

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486	<p>Deloitte shall permanently assign all staff identified as "key personnel" to the MCSD Project in accordance with Section 30 of the Information Systems Processing Agreement regarding Key Personnel, until the tasks proposed have been completed and approved by the Department, unless:</p> <ul style="list-style-type: none"> • An individual terminates his employment with the contractor, or • An individual becomes physically or mentally unable to carry out the duties assigned by the contractor, or • The DSS Project Administrator requests that an individual be removed from the project, or • The vendor wishes to propose a more qualified individual who shall better serve the needs of the Department, and the contractor can demonstrate that the transition shall be managed to the benefit of the Department. <p>Deloitte must receive in advance the written approval from the Department for changes in key personnel prior to such changes being made. Deloitte shall submit to the Department for its approval, the name and credentials of any persons who are proposed to replace existing or previously proposed project management staff, or other key personnel identified by the state. These changes shall not negatively impact the Department or adversely affect Deloitte's ability to meet any requirement or deliverable set forth in this contract, the proposer's response, and/or the resultant contract.</p> <p>Deloitte's Project Manager shall be responsible for the implementation and management of the project, for monitoring and ensuring the performance of duties and obligations under the contract, and the day-to-day oversight of the project. Deloitte's Project Manager's schedule shall assure that the Project Manager is present for project progress meetings, as well as other critical meetings. The Project Manager shall be the resultant contractor's representative for providing status updates and ad hoc and interim reports.</p>
487	9.3 Key Personnel
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489	<p>DSS has identified the following "key personnel" roles for the project. Deloitte can revise this list with an explanation of their assumptions for key personnel; however, the proposal must identify the specific roles that shall assure DSS of the appropriate level of staffing. The relationship of Key Personnel to Deloitte must be defined (employee, Independent Contractor, subcontractor, etc). DSS requires, at a minimum, that the Project Manager be located on site for 80% of their time, and the 3 Technical Leads be on site 50% of their time. Exceptions to these percentages may be made by the DSS Project Manager.</p> <p>Key Personnel defined in this proposal include:</p> <ul style="list-style-type: none"> • Project Manager; • Senior Architect or System Integration Manager • Web Technical Lead; • IVR Technical Lead; • Document Management & Workflow Technical Lead; • Business Lead or Senior Subject Matter Expert • Test Manager; and • IMS/COBOL Resource